B3932-2-F

Taking the Perfect Picture: A Study of the Amateur American Photographer

Prepared for:

Fuji Photo Film U.S.A., Inc.

Prepared by:

Yankelovich, Skelly and White/Clancy, Shulman, Inc.

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I. Introduction

A. Study Objectives

The main purposes of this study of amateur American photographers are to:

- **Measure consumers' interest in and knowledge of photography and pictures.**
- **Determine what problems consumers are having with their photographs and the perceived causes of the problems.**
- **Learn what changes in film, cameras and processing would make Americans enjoy photography more and would encourage them to take more pictures.**
- **Measure consumer purchase habits regarding film, cameras and photo processing.**

I. Introduction

B. Study Methodology

In order to meet these study objectives, Yankelovich Clancy Shulman conducted 1,010 telephone interviews among American adults.

- **Respondents were selected through random digit dialing to ensure that all adults (including those with unlisted phone numbers) had an equal probability of selection.**
- **The sample was screened to include only respondents who had taken a picture with a camera within the past year. Respondents who were or had been professional photographers were excluded from the sample.**
- **Data were weighted to ensure that the sample's demographics reflect the U.S. Bureau of Census' 1990 projections for the continental United States. The margin of error for this sample is plus or minus 3%.**

II. Main Findings

1. Americans are avid photographers and place a great deal of value in the pictures that they take.

   - **Two in three say that their pictures are very important to them.**
   - **Four in five report that taking pictures is something they like to do a lot or sometimes.**
   - **Two in five are taking more pictures today than five years ago.**
   - **The average American family uses 15 rolls of film each year.**

II. Main Findings

2. While Americans clearly enjoy photography, only a minority feel adept at taking pictures and most have a number of problems with the pictures that they take.

   - **More than one in two admits knowing little or nothing about photography. Only a minority of amateurs (including heavy film users) claim to know a great deal.**
   - **Photographers report dissatisfaction with pictures taken under a variety of conditions -- including action shots, distance shots and difficult lighting conditions.**
   - **They also report specific problems such as pictures that are too dark, too light or out of focus.**
   - **Three in four attribute poor pictures to mistakes they make themselves.**

II. Main Findings

3. Photographers would react positively to a number of strategies designed to improve their pictures.

   - **Many express an increased likelihood of taking more pictures if they could learn how to take better pictures. A majority would like to know more about:**
     - Taking pictures in different outdoor lighting settings
     - Taking better indoor flash pictures
     - How their camera works
     - How to use different types of lenses
   - **Photographers are also interested in services that processors and retailers could potentially provide such as offering tips for taking better pictures.**

II. Main Findings

4. American photographers feel there are important differences among different brands of film.
   - **A majority buys the same brand of film all of the time.**
   - **Two in three think it is very important to have a choice of films and film speeds.**
5. Consumers take a number of criteria into consideration when choosing where to get their film processed.
   - **The most important criteria include cost of processing, location and speed of processing.**
6. The camera of preference of the average American photographer is a 35 millimeter model.

III. A Nation Of Avid Photographers

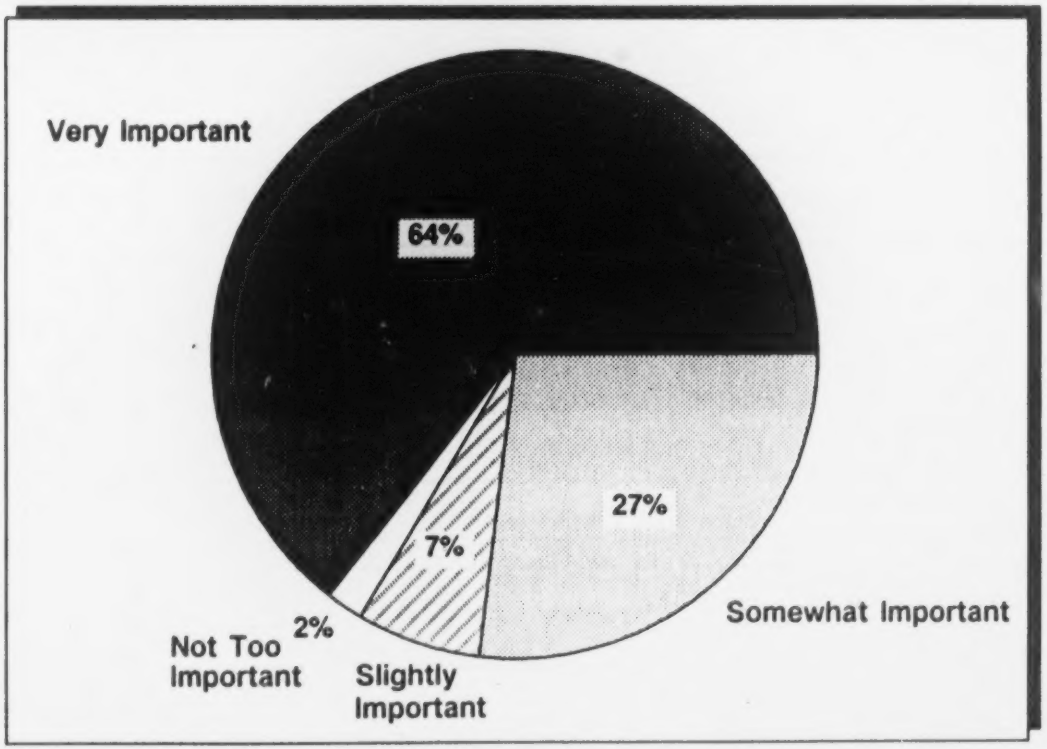
Americans treasure their photographs and report that they enjoy taking pictures.

- **Two in three say that their photographs are very important to them.**
  - Four in five women say that their photographs are very important to them.
- **Almost four in five report that taking pictures is something they like to do a lot or sometimes.**
  - Favorite subjects include family celebrations, people, children and vacations.

Importance Of Photographs

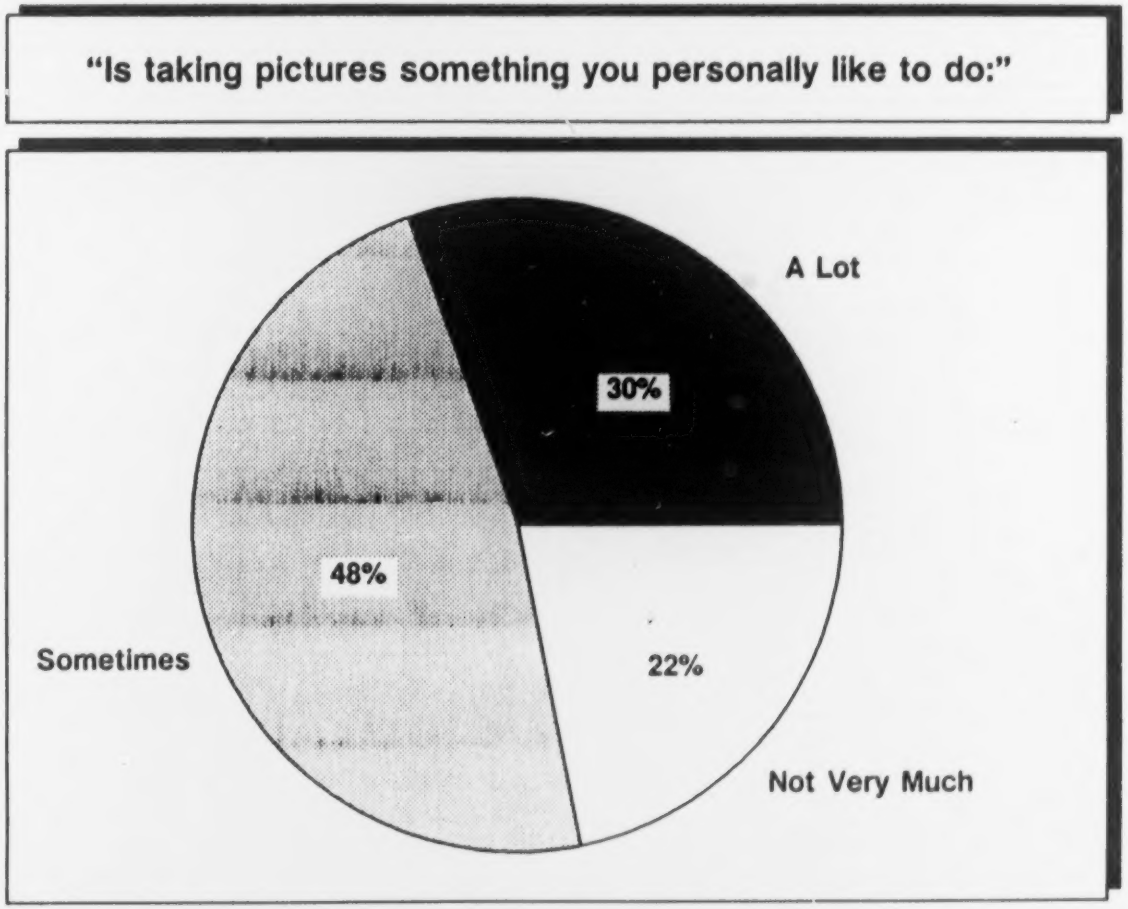
- Two in three (64%) photographers say their photographs are very important to them.

"Overall, how important would you say your photographs are to you — very important, somewhat important, slightly important or not too important?"



Sentiments About Taking Pictures

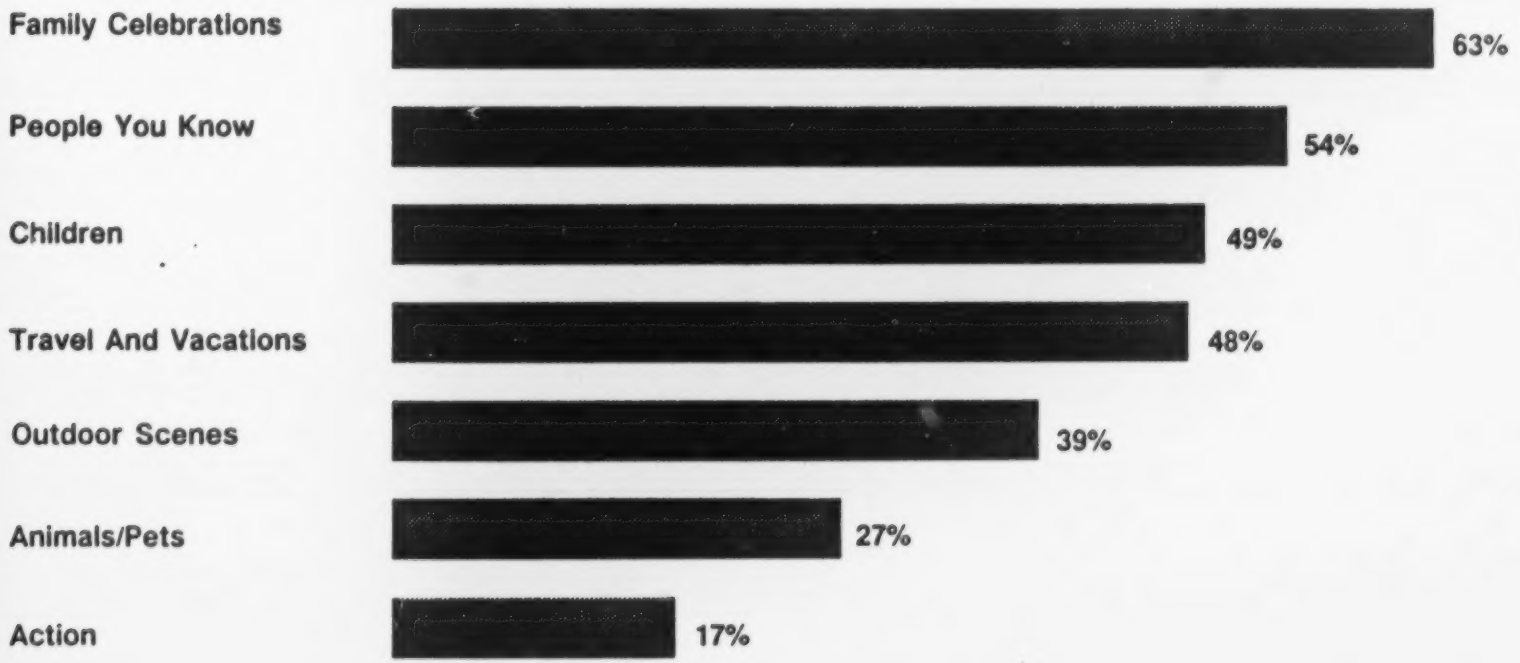
- More than three in four (78%) report that they personally enjoy taking pictures.



Favorite Subjects For Picture Taking*

- The most popular subjects for pictures are other people.

"Which of these are among the favorite subjects you like to take in your pictures?"



* Multiple responses allowed.

III. A Nation Of Avid Photographers

Two in five Americans report taking more pictures today than five years ago.

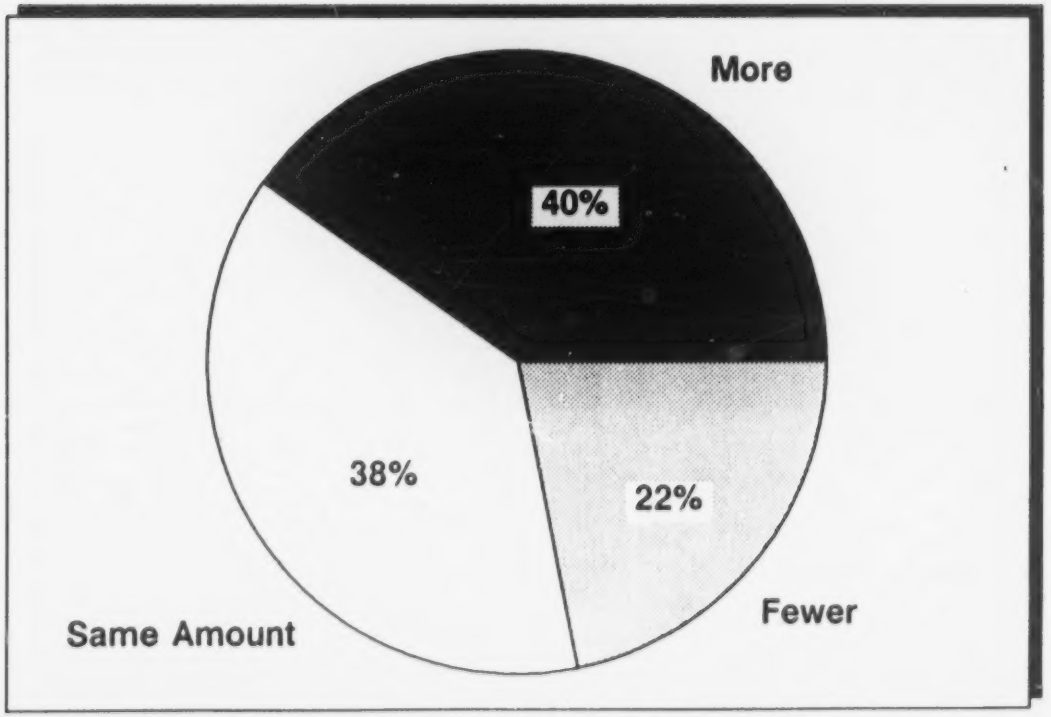
- **One in two adults under the age of 35 is taking more pictures.**

The average family uses 15 rolls of film per year.

Picture Taking Habits Compared To Five Years Ago

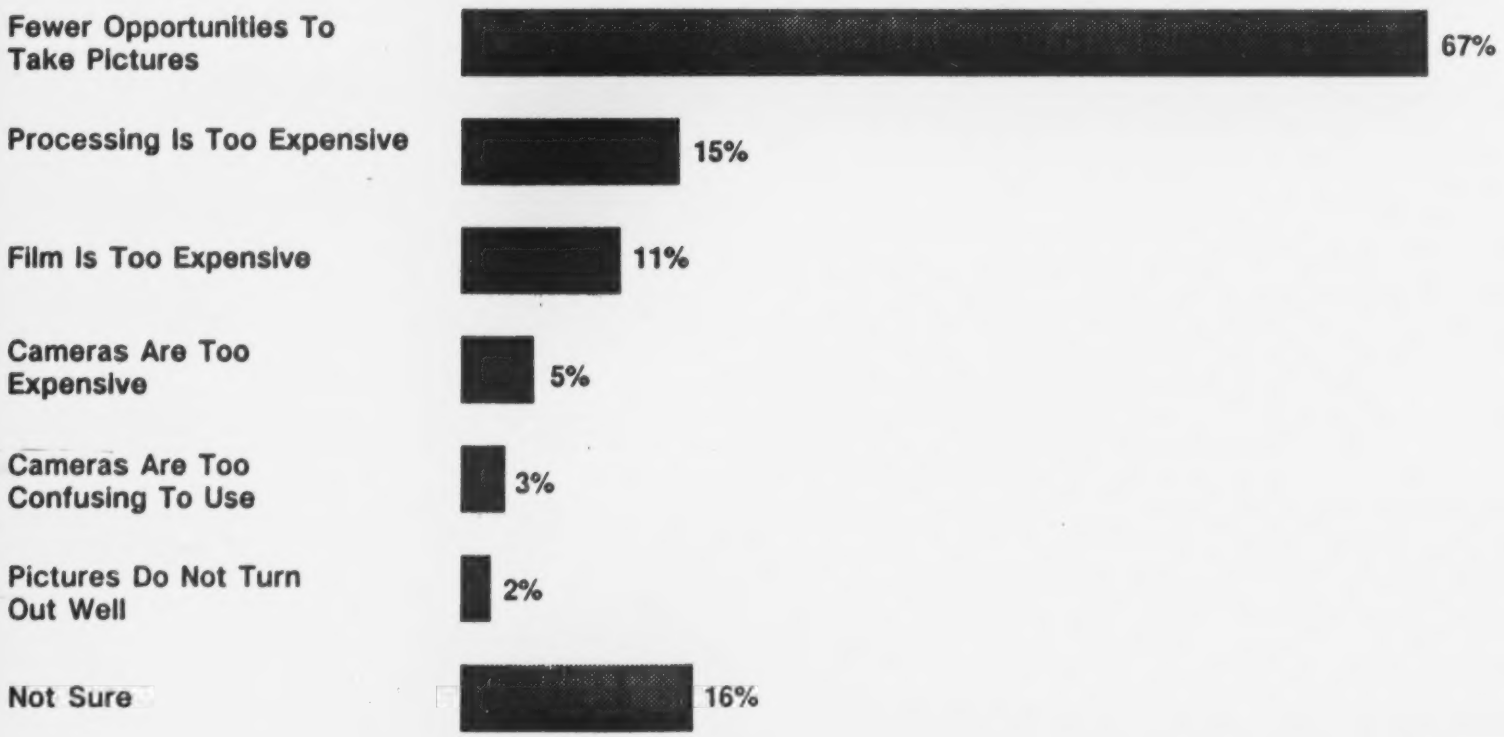
- Two in five Americans (40%) have increased the number of pictures that they take in the past five years.

"Compared to five years ago, are you taking more pictures, fewer pictures or about the same number of pictures?"



Reasons Why Currently Taking Fewer Pictures*

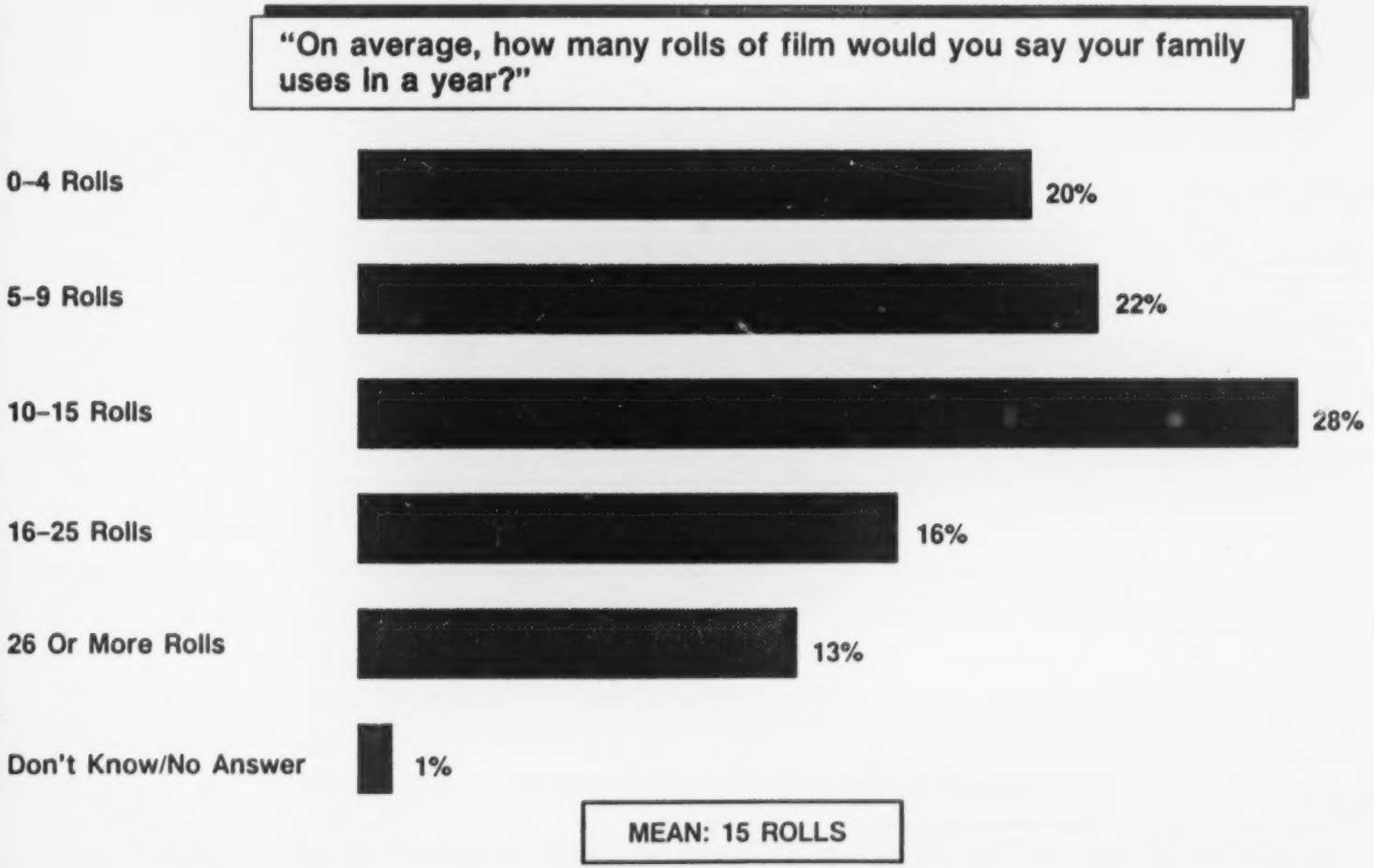
Proportion saying main reasons why taking fewer pictures now:



* Among those who are taking fewer pictures now compared to five years ago (base=22%).

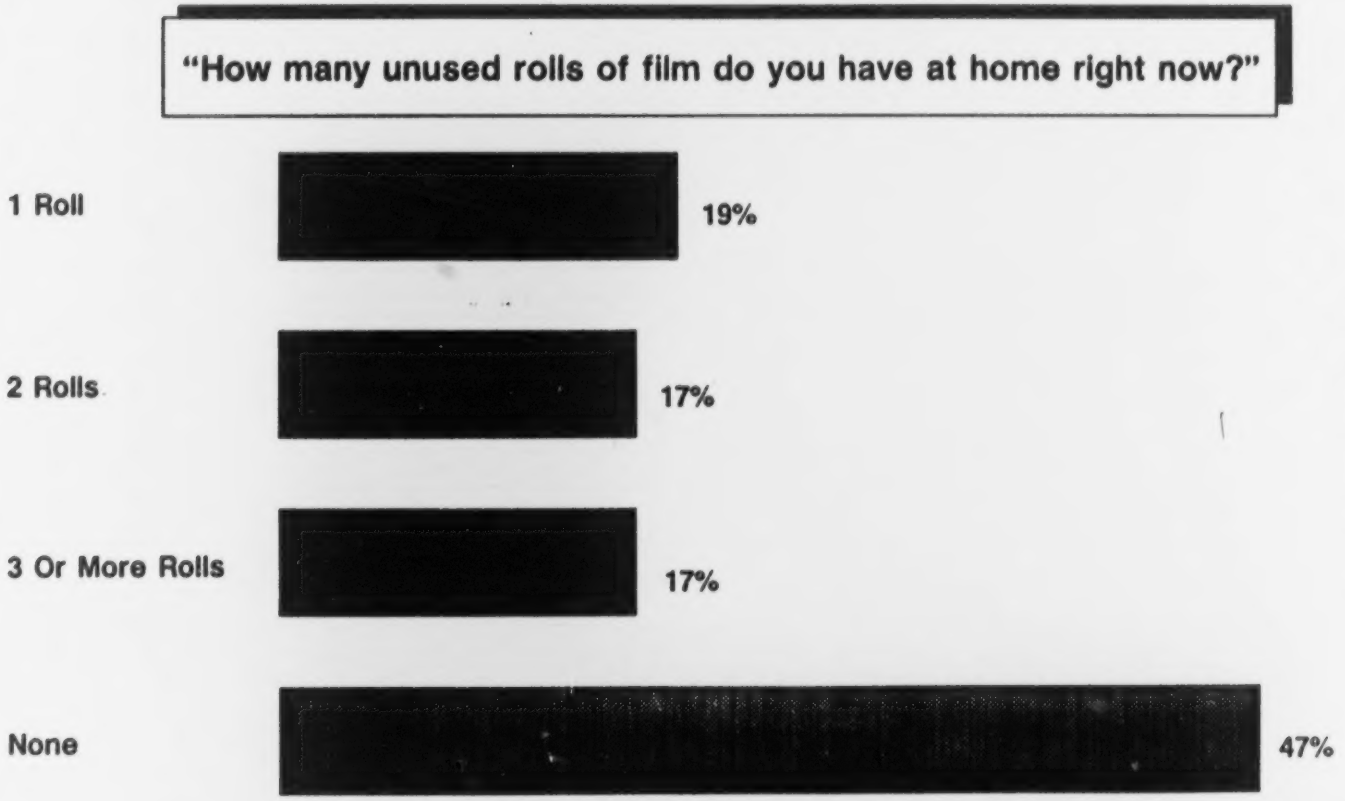
Rolls Of Film Family Uses In A Year

- The average family uses 15 rolls of film each year; three in ten use 16 or more rolls per year.



Unused Rolls Of Film In Household

- On average, families keep two unused rolls of film at home.



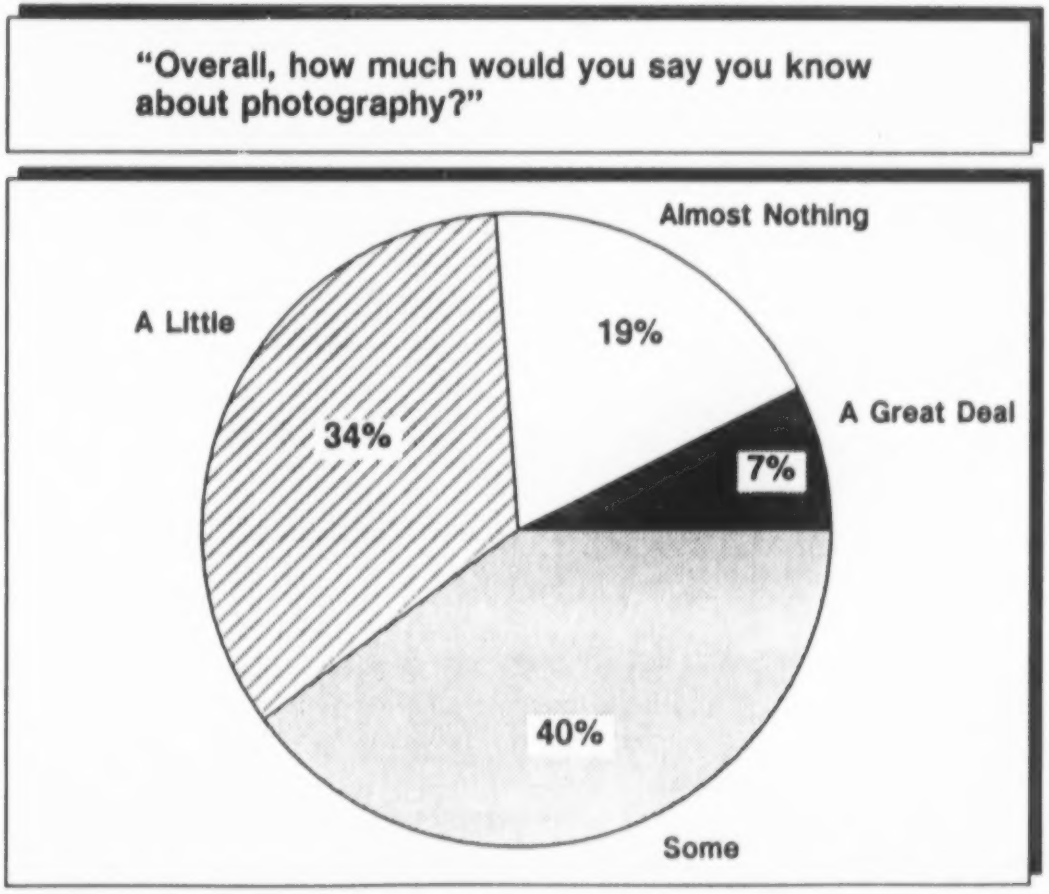
IV. Common Problems People Have With Their Pictures

While many Americans enjoy photography and actively take pictures, most admit that they are not all that knowledgeable about the hobby and express dissatisfaction with the quality of their pictures.

- **Fewer than one in ten feel they know a great deal about photography.**
  - This applies to experienced amateurs and novices alike -- only 15% of heavy film users and 15% of those who like to take pictures a lot know a "great deal" about photography.
- **Photographers report that, on average, they have problems with two pictures on each roll of film that is developed.**
  - This average also applies to the heaviest film users, those who feel that they are knowledgeable about photography and those who like photography the most.
- **Three in ten have problems with three or more pictures on each roll of film that is developed.**

Knowledge About Photography

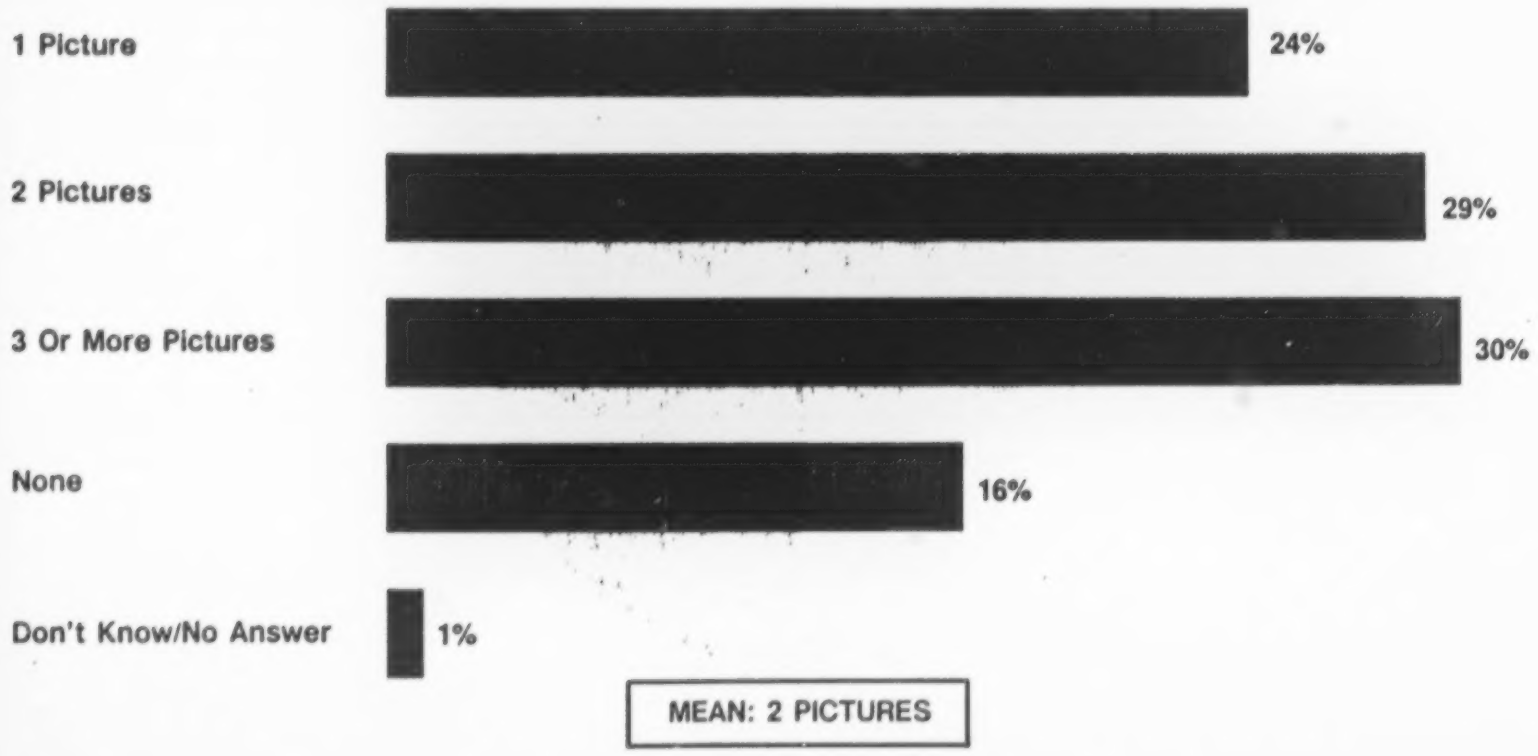
- Only 7% know a "great deal" about photography; more than one in two (53%) know little or nothing.



Number Of Problem Pictures On Average Roll Of Film

- On average, photographers have two pictures per roll that do not turn out well.

"On a roll of film, how many of your pictures -- on average -- have something wrong with them after they are developed?"

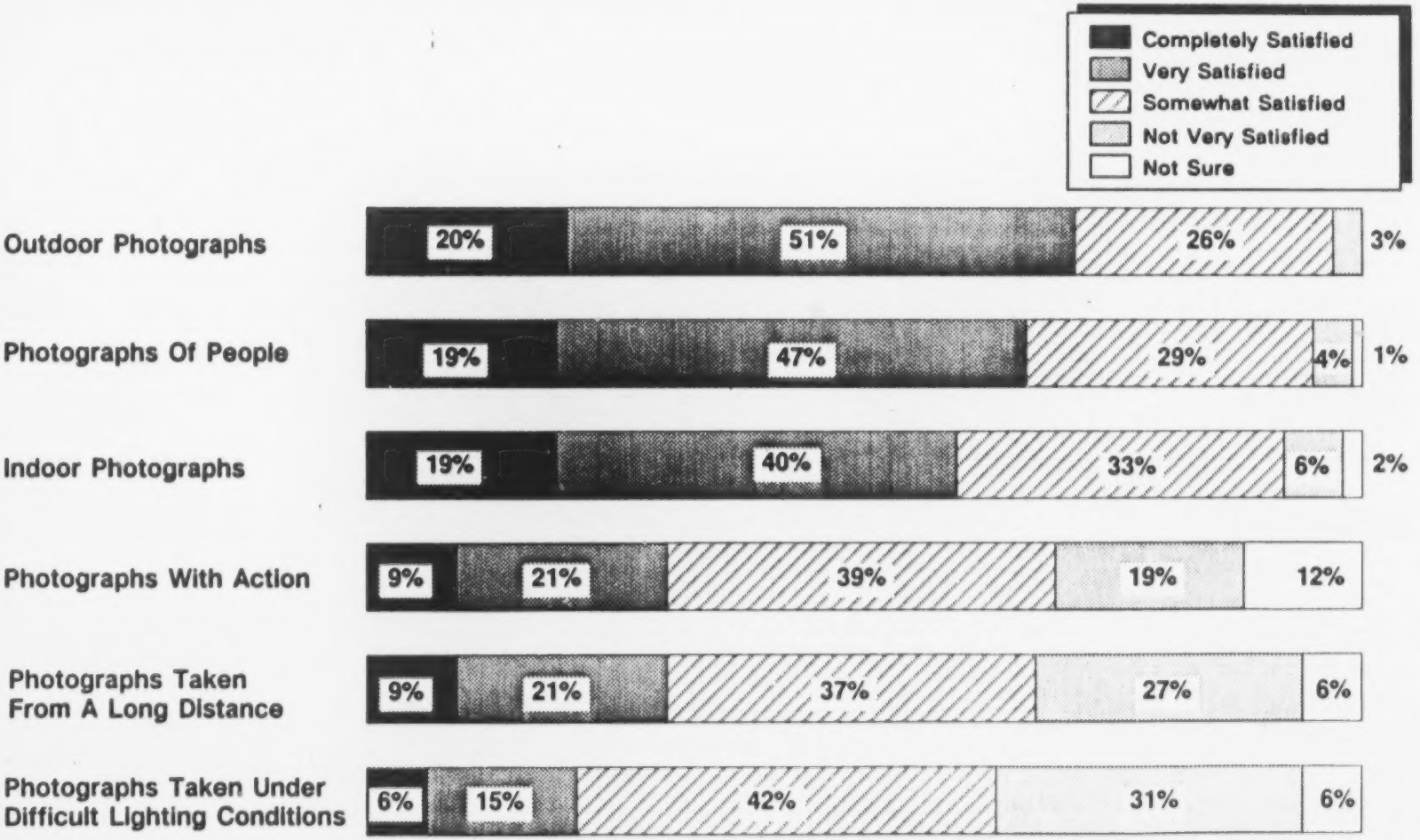


MEAN: 2 PICTURES

IV. Common Problems People Have With Their Pictures

- **Few photographers are completely satisfied with the pictures they take under a variety of conditions. Large numbers of photographers express dissatisfaction with:**
  - Photographs taken under difficult lighting conditions.
  - Photographs taken from a long distance.
  - Action photographs.

Satisfaction With The Quality Of Photographs



IV. Common Problems People Have With Their Pictures

Other specific problems photographers frequently have with their photographs include:

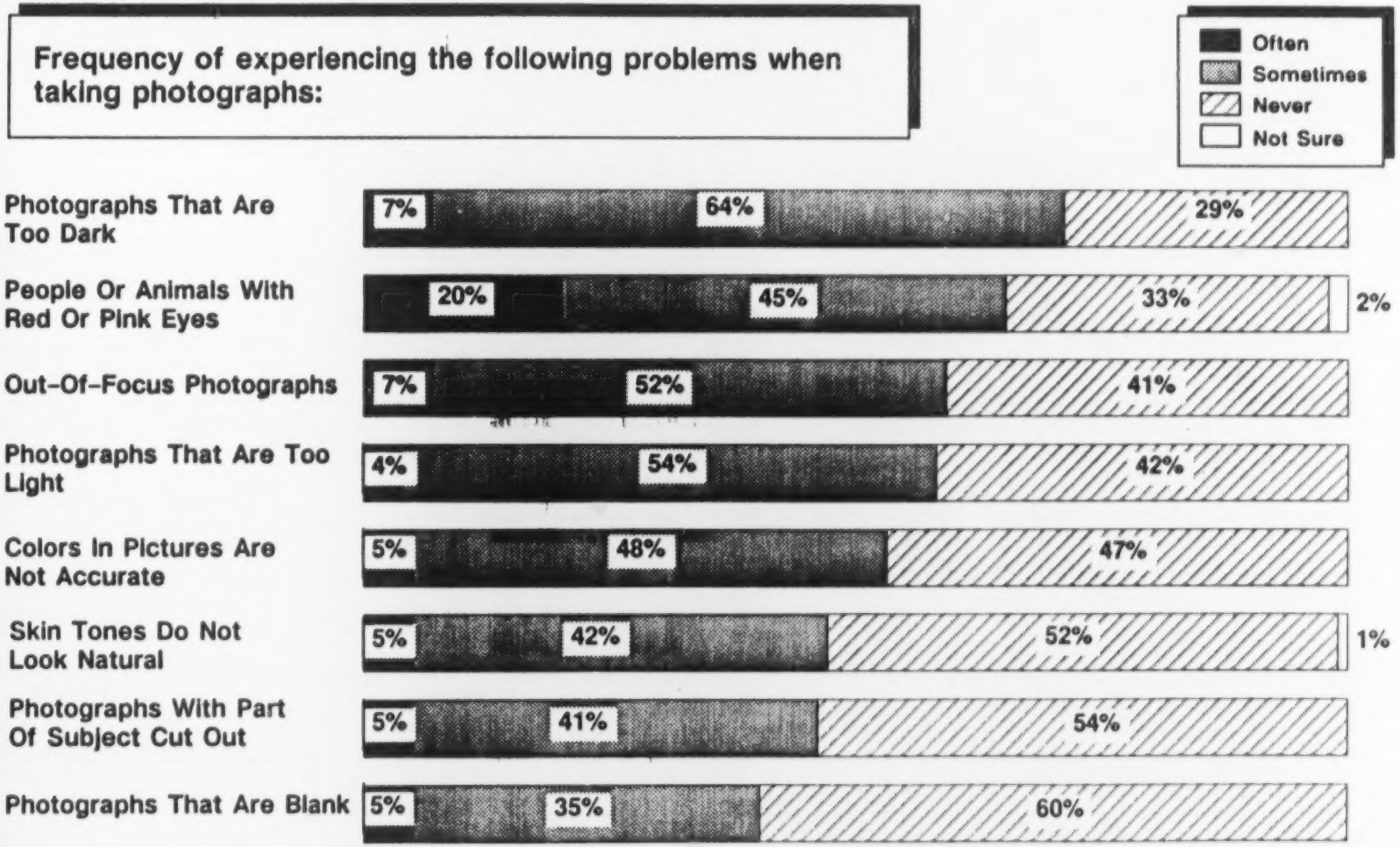
- **Pictures that are too dark or pictures that are too light.**
- **The "red eye" effect in pictures.**
- **Pictures that are out of focus or pictures that are not accurate in color.**

Three in four attribute their poor pictures to mistakes they make while using their cameras.

- **The most frequently cited problems with using cameras are deciding which film is best to use and when to use a flash.**

Problems With Photographs

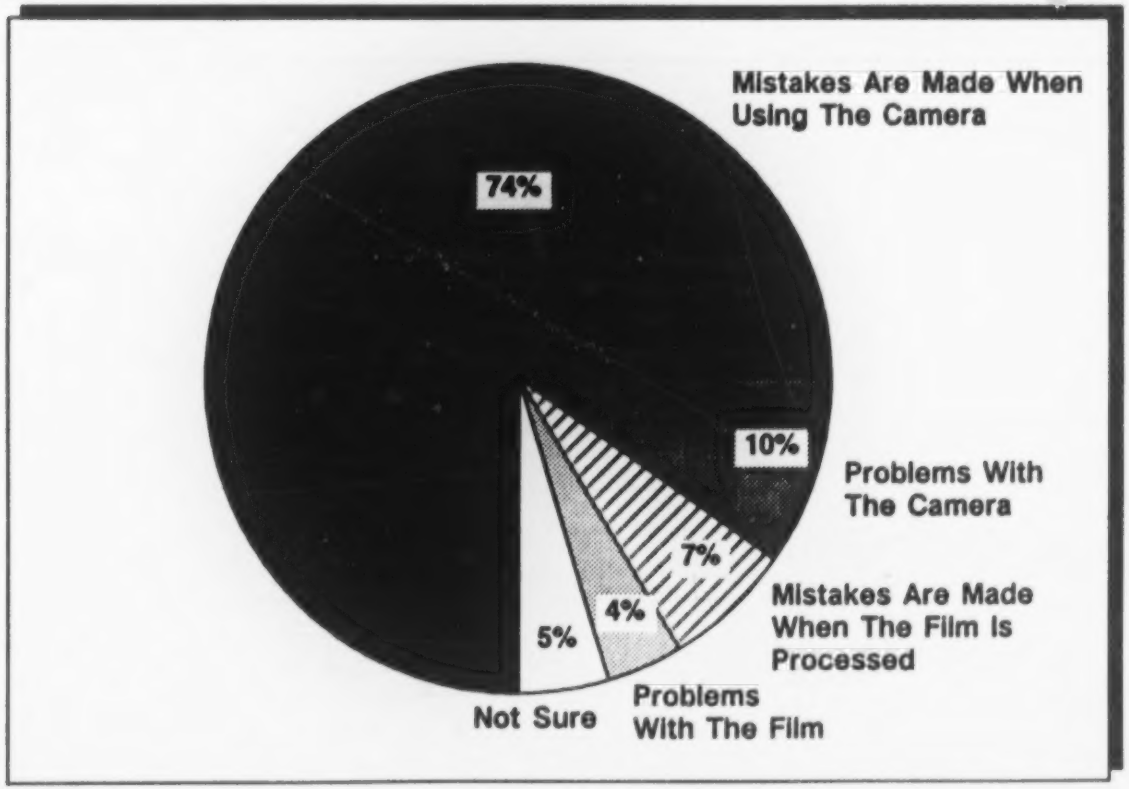
Frequency of experiencing the following problems when taking photographs:



Main Cause Of Poor Photographs

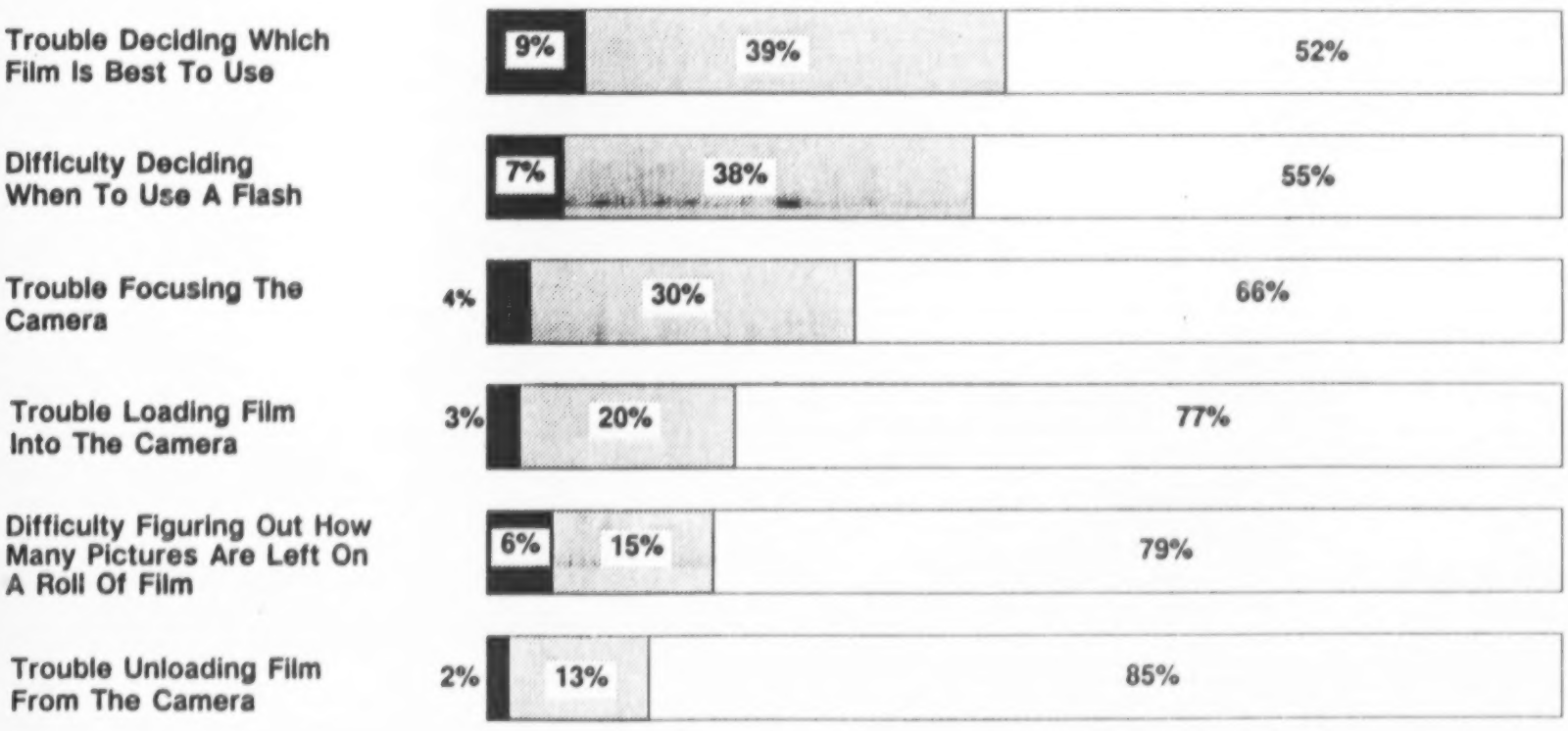
- Three in four photographers fault themselves for pictures that do not turn out well.

"Which one of the following do you think is the *main reason* for the problems with your photographs?"



Problems With Camera Usage

Frequency of experiencing the following problems when using a camera:



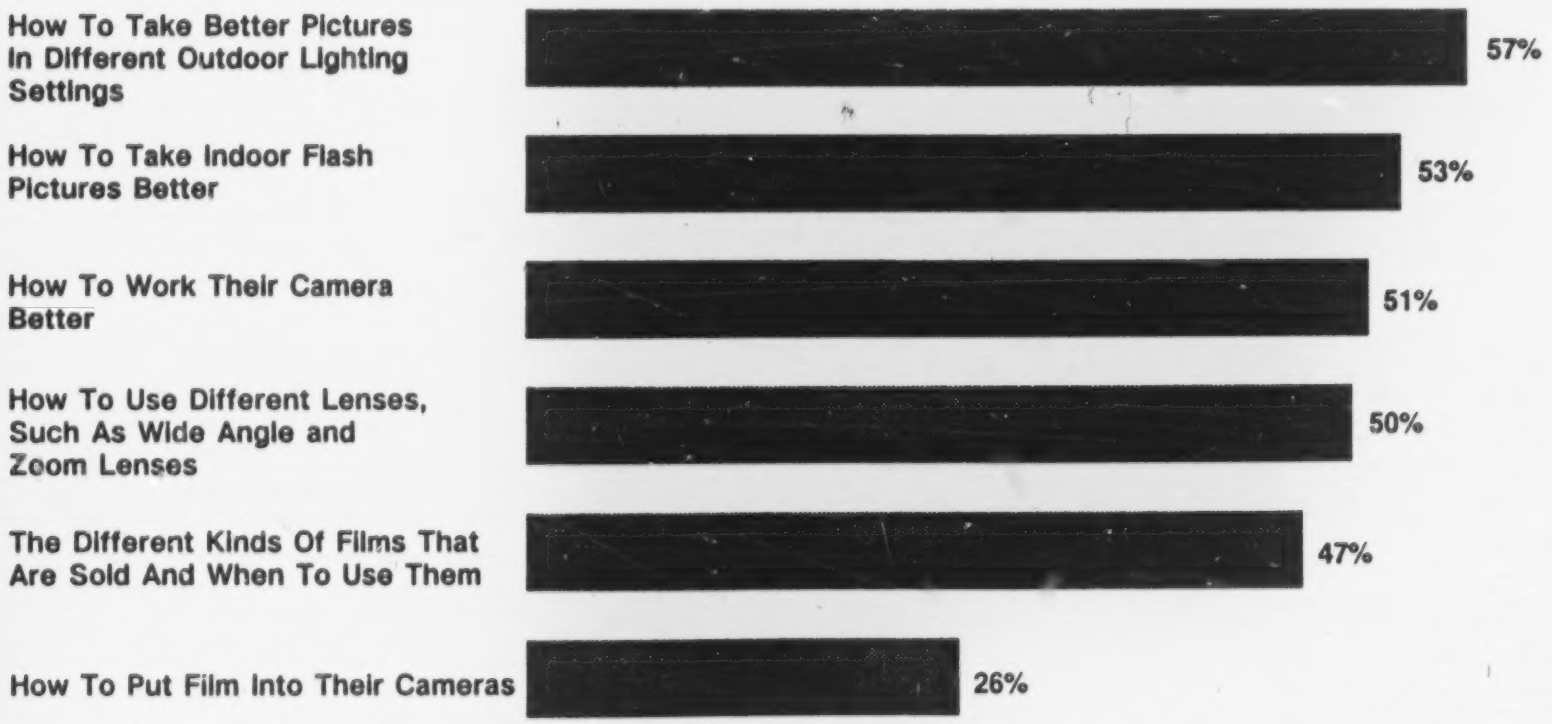
V. Potential Interest In Improving Photography Skills

Americans express an increased likelihood of taking more pictures if they could learn more about photography. They are especially interested in learning:

- **How to take better pictures in different outdoor lighting settings.**
- **How to take indoor flash pictures better.**
- **How to work their cameras better.**
- **How to use different lenses.**

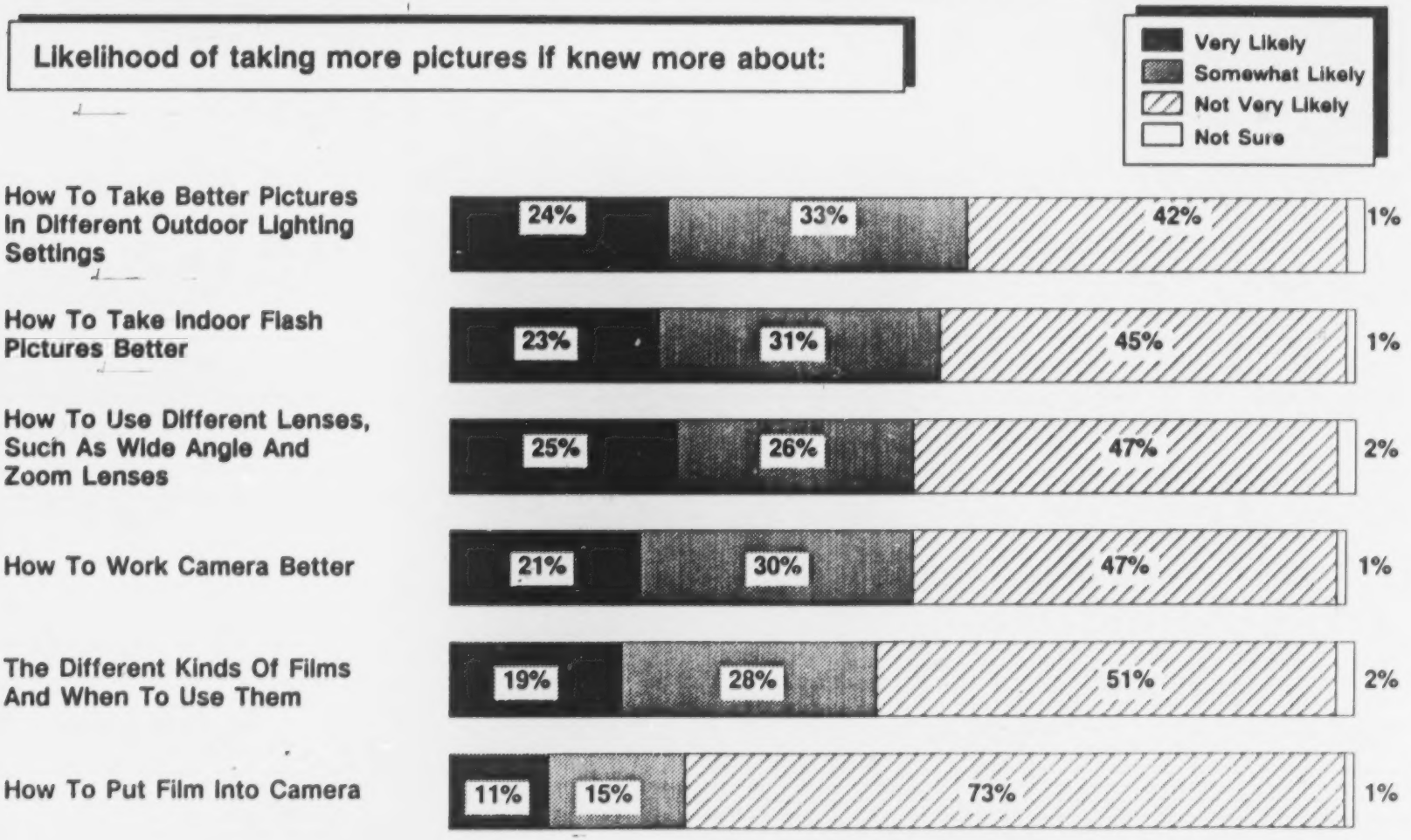
Likelihood Of Taking More Pictures If Knew More About Photography

Proportion who are very/somewhat likely to take more pictures if they knew more about:


How To Take Better Pictures In Different Outdoor Lighting Settings
57%
How To Take Indoor Flash Pictures Better
53%
How To Work Their Camera Better
51%
How To Use Different Lenses, Such As Wide Angle and Zoom Lenses
50%
The Different Kinds Of Films That Are Sold And When To Use Them
47%
How To Put Film Into Their Cameras
26%

Likelihood Of Taking More Pictures If Knew More About Photography

Likelihood of taking more pictures if knew more about:



V. Potential Interest In Improving Photography Skills

Consumers say there are many specific things which would encourage them to take more pictures in the future. Some of these are services or tips that processors and retailers can provide to help improve the quality of customers' photographs.

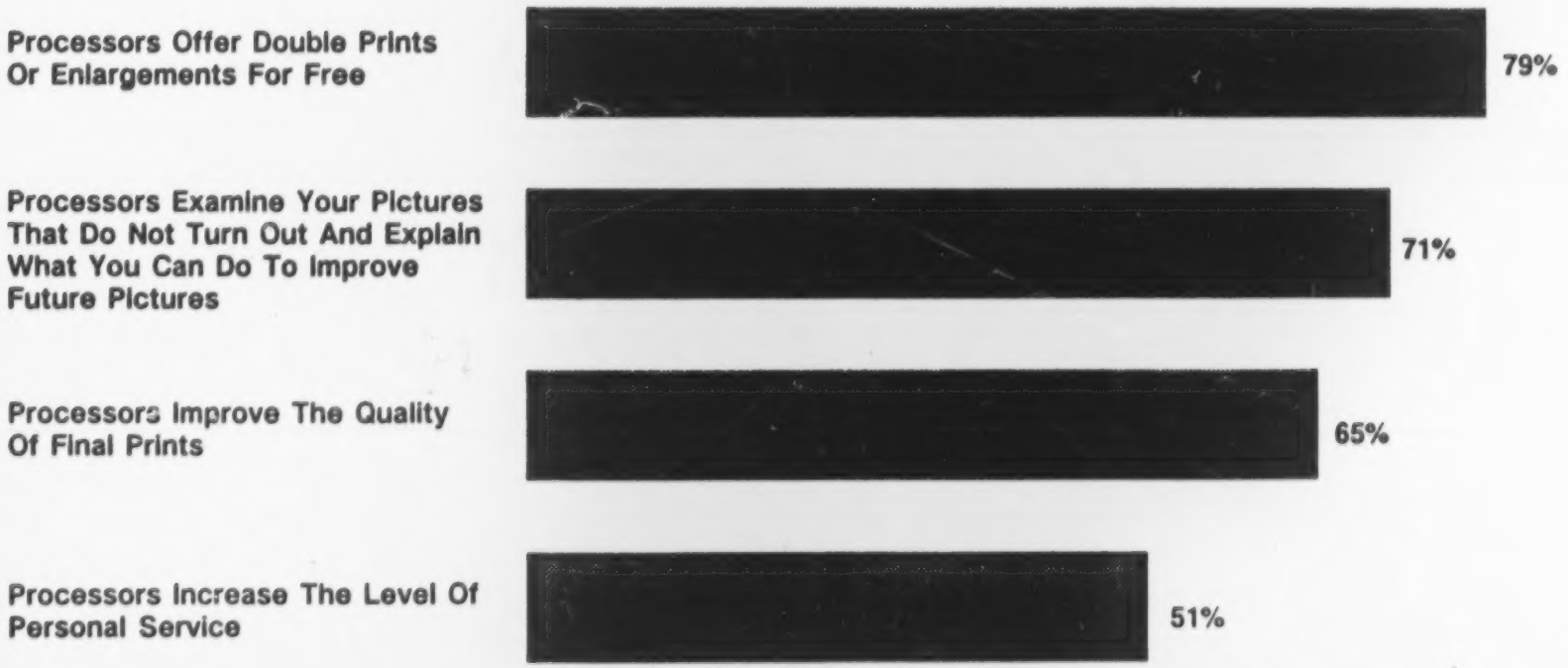
A. Photo Processing

Photographers express interest in a number of services that photo processors might offer.

- **Four in five would take more pictures if processors offered double prints or enlargements for free.**
- **Seven in ten would like processors to explain how to improve the quality of future photos.**
- **Two in three would be encouraged to take more pictures if processors improved the quality of final prints.**
- **One in two would take more pictures if processors increased the level of personal service.**

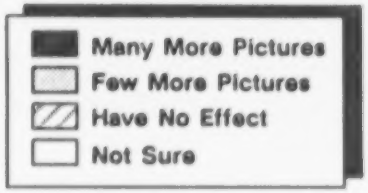
Effect Of Improved/Greater Processing Service On Picture Taking

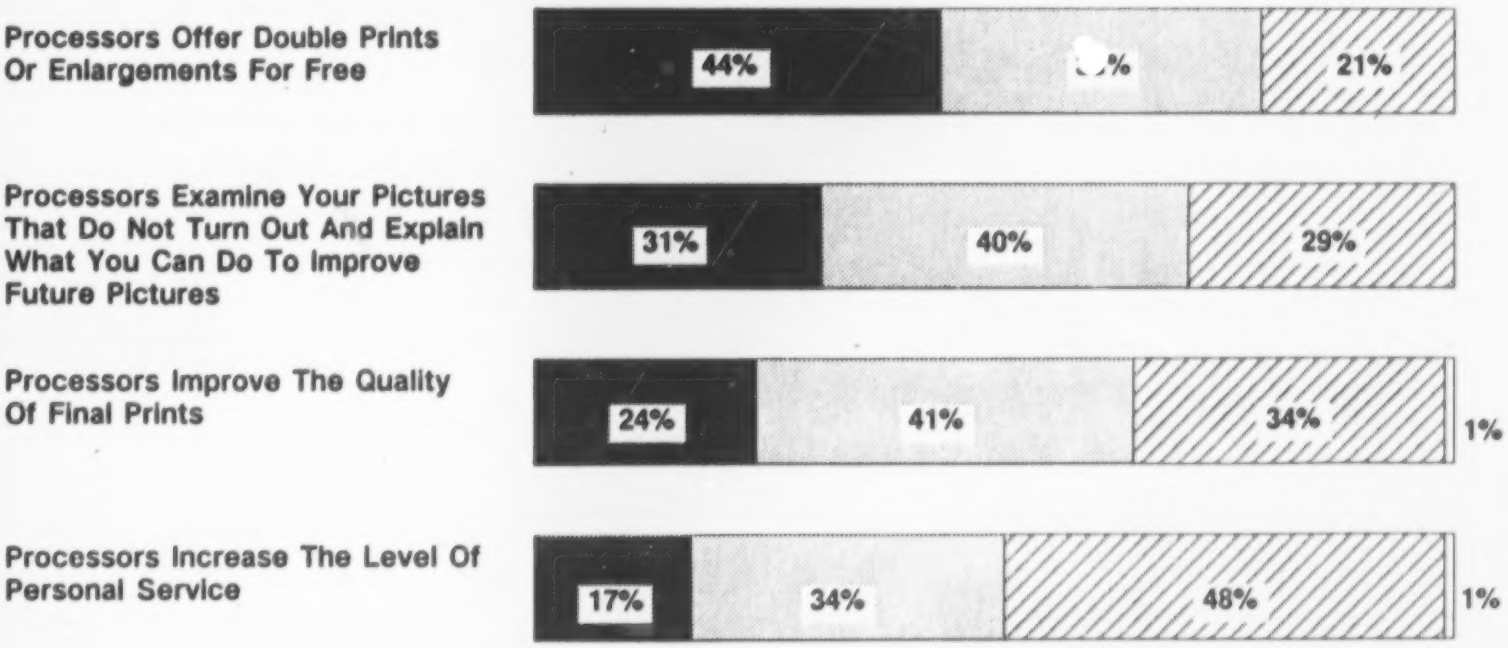
Proportion saying each would encourage them to take more pictures:


Processors Offer Double Prints Or Enlargements For Free
79%
Processors Examine Your Pictures That Do Not Turn Out And Explain What You Can Do To Improve Future Pictures
71%
Processors Improve The Quality Of Final Prints
65%
Processors Increase The Level Of Personal Service
51%

Effect Of Improved/Greater Processing Service On Picture Taking

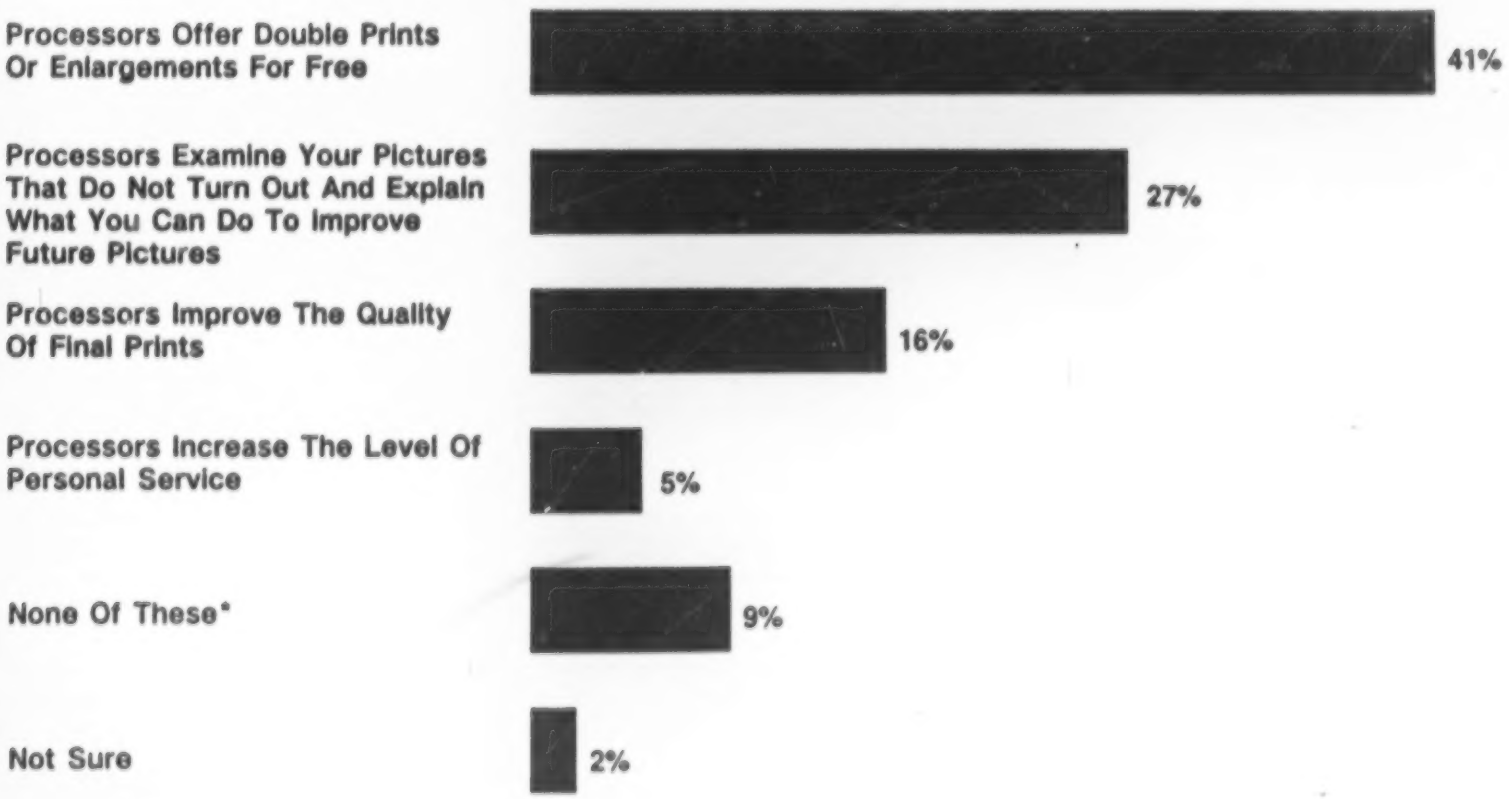
"Now, here are some specific things regarding photo processing that could be done to encourage people to take more pictures. Please tell me if it would encourage you to take many more pictures, a few more pictures or if it would have no effect."





What Is Desired Most In Photo Processing

"Of the ideas that we have just discussed, which one would encourage you to take more pictures the most?"


Processors Offer Double Prints Or Enlargements For Free
41%
Processors Examine Your Pictures That Do Not Turn Out And Explain What You Can Do To Improve Future Pictures
27%
Processors Improve The Quality Of Final Prints
16%
Processors Increase The Level Of Personal Service
5%
None Of These*
9%
Not Sure
2%

* Volunteered response.

V. Potential Interest In Improving Photography Skills

B. Film and Cameras

Consumers also show interest in potential film sales services, such as:

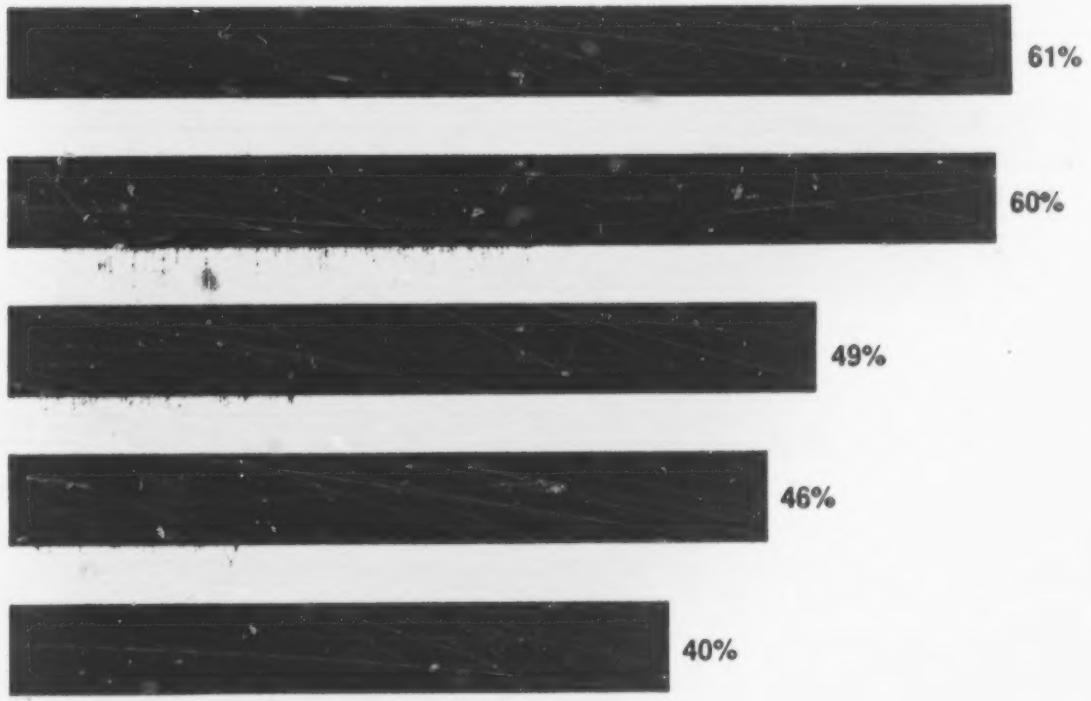
- **"Frequent photo" discount programs.**
- **Having sales people examine old pictures and provide tips on how to avoid the same photographic mistakes.**
- **Having sales people explain about the different types of film or providing photography tips.**

Many indicate that certain camera improvements would get them to take more pictures.

- **Two in three express interest in cameras that focus and adjust automatically.**
- **More than one in two would take more pictures if cameras were less expensive.**

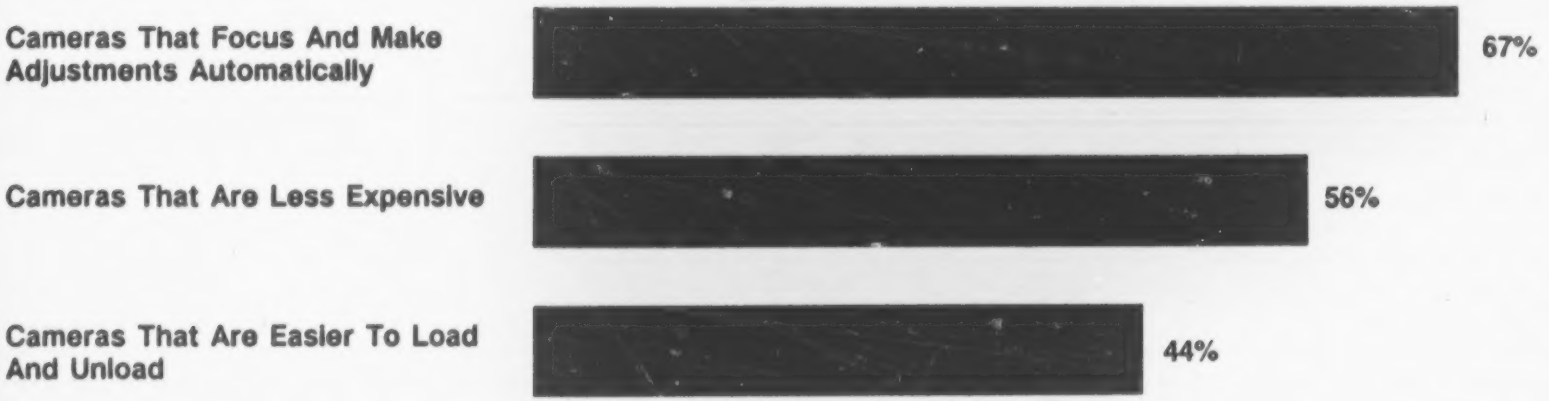
Effect Of Improved Retailing On Picture Taking

Proportion saying each would encourage them to take more pictures:


The Store Where You Buy Film Offers A "Frequent Photo" Program That Provides Discounts
61%
Sales People Examine Your Old Pictures That Did Not Turn Out And Tell You How To Avoid The Same Mistakes
60%
Sales People Explain The Different Types Of Film To You
49%
Sales People Give You Photography Tips When You Buy Film
46%
Sales People Offer Ideas And Suggestions For Creative Pictures
40%

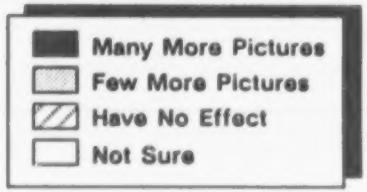
Camera Improvements That Would Encourage More Picture Taking

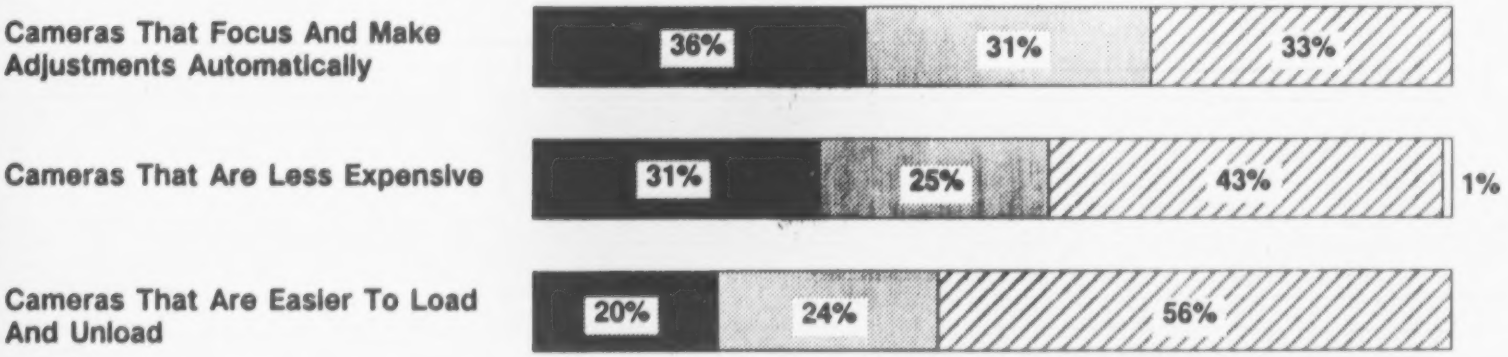
Proportion saying each would encourage them to take more pictures:



Whether Camera Improvements Would Encourage More Picture Taking

"For each of these improvements in cameras, please tell me if it would encourage you to take many more pictures, a few more pictures or if it would have no effect."





VI. Film Buying Habits

Most consumers are well aware of differences in film brands and tend to be brand loyal.

- **Three in five believe there are some real differences among film brands.**
- **Seven in ten buy the same brand of film all of the time.**
- **Because of the sensitivity to differences in film, two in three feel it is very or somewhat important to have a choice of films and film speeds.**

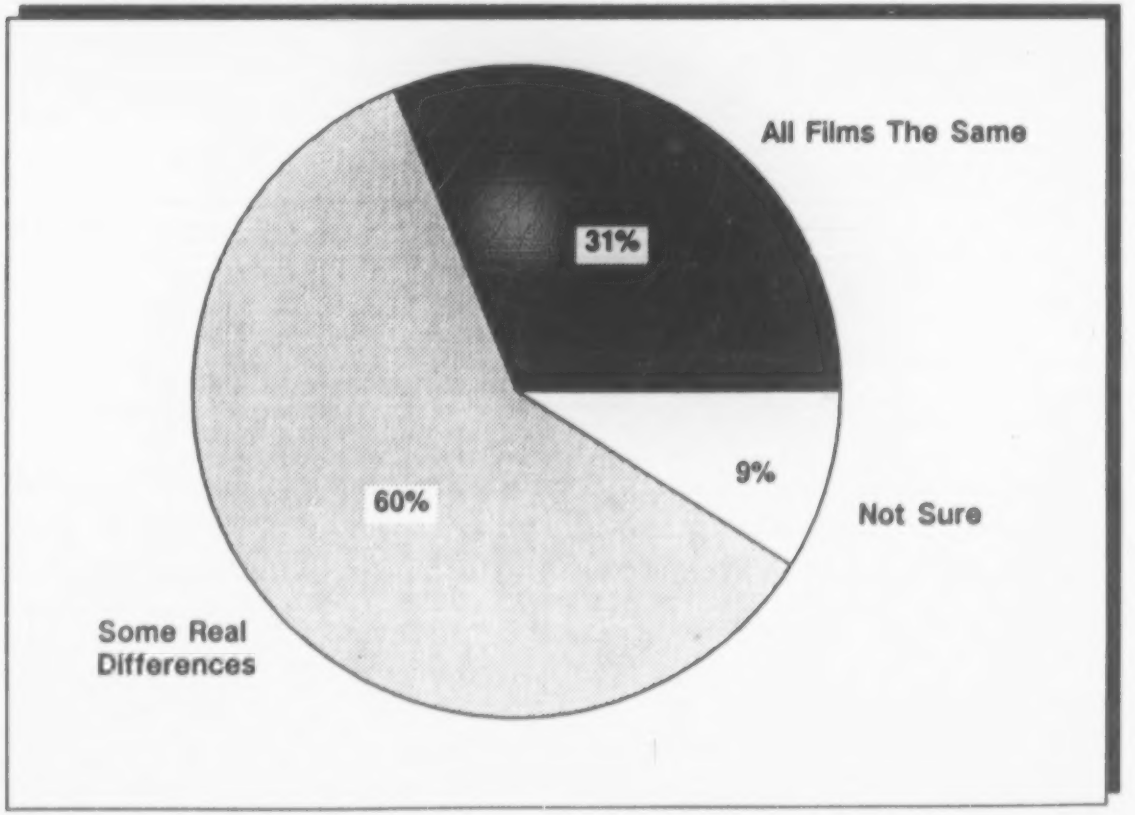
There is a particularly strong interest in a film designed especially for taking pictures of people. This level of interest is not surprising as people are the most popular photographic subjects.

- **Two in three have either a great deal of interest or some interest in this special film.**

Perceptions Of Differences/Similarities Among Film Brands

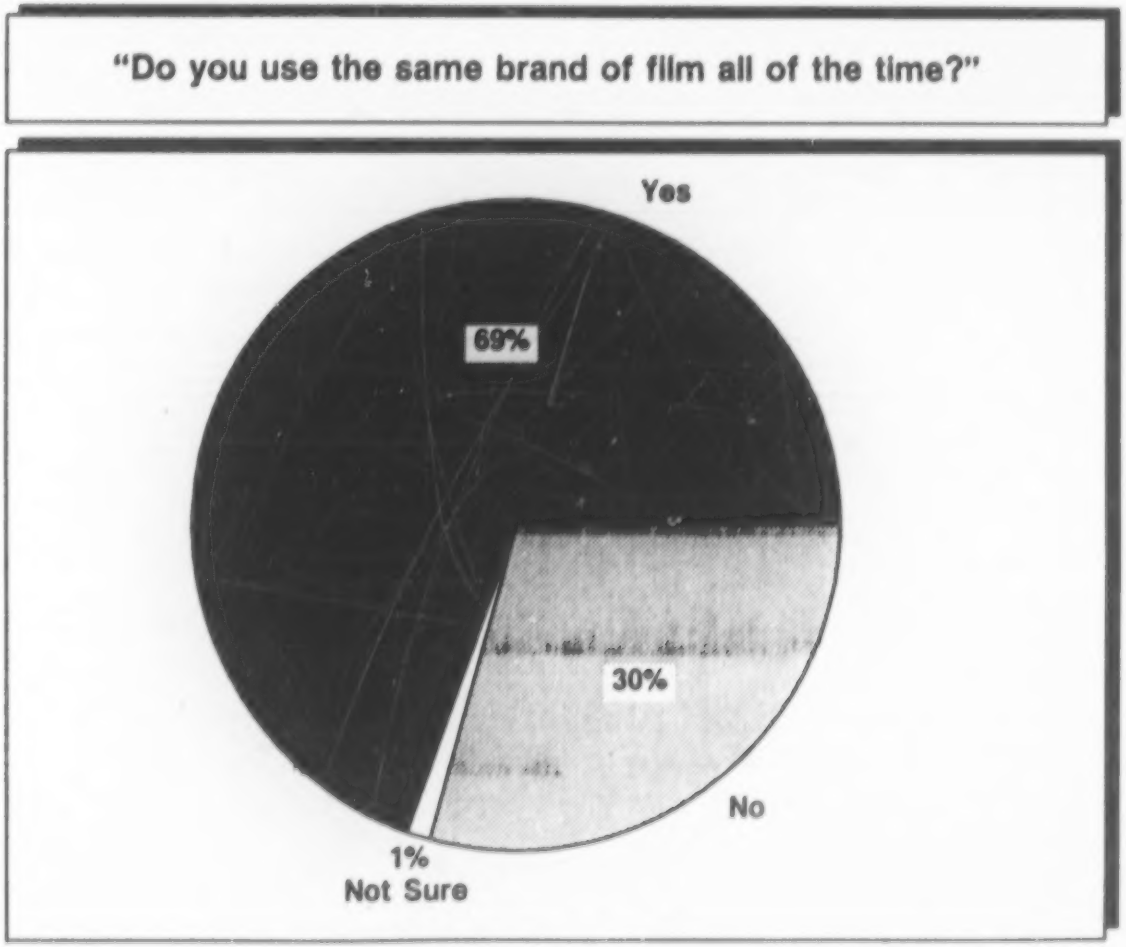
- Three in five (60%) photographers see important differences in different brands of film.

"In your opinion, are all brands of film pretty much the same or are there some real differences?"



Film Brand Loyalty

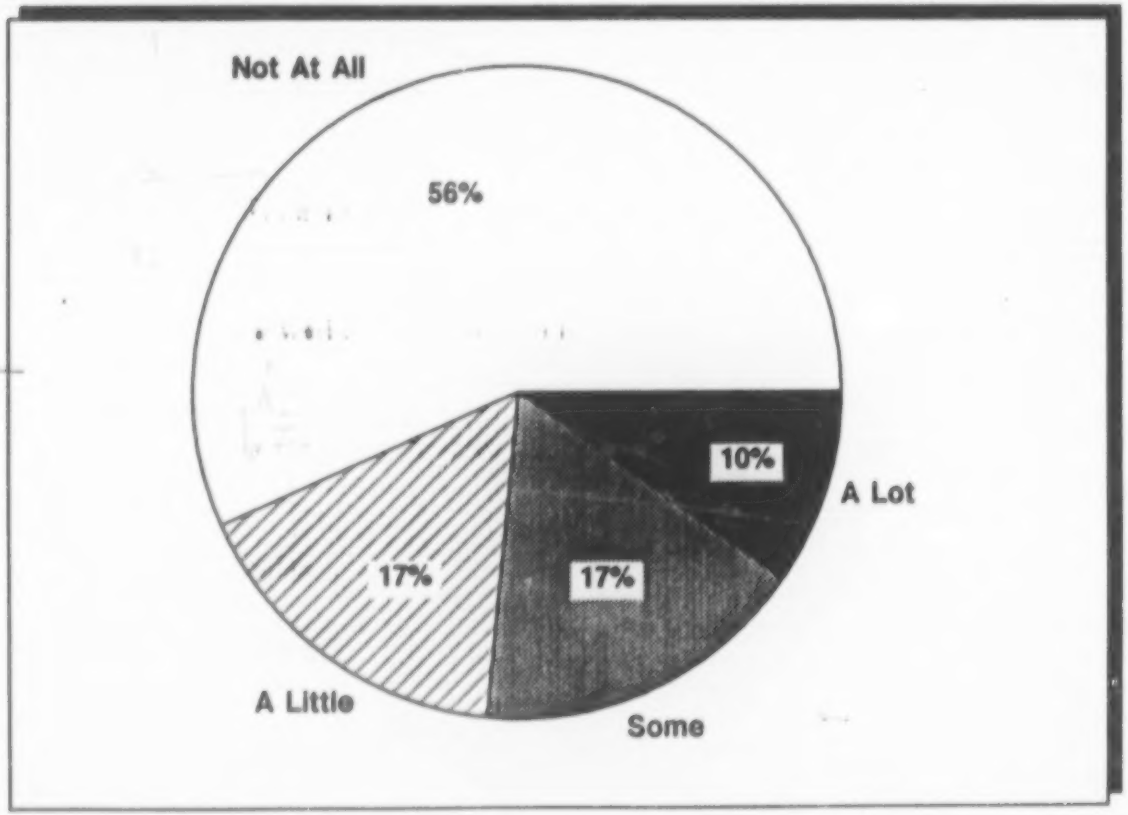
- Seven in ten (69%) photographers express loyalty to one brand of film.



Reliance On Sales Personnel When Choosing Film

- Only one in four (27%) relies a lot or some on sales personnel when buying film.

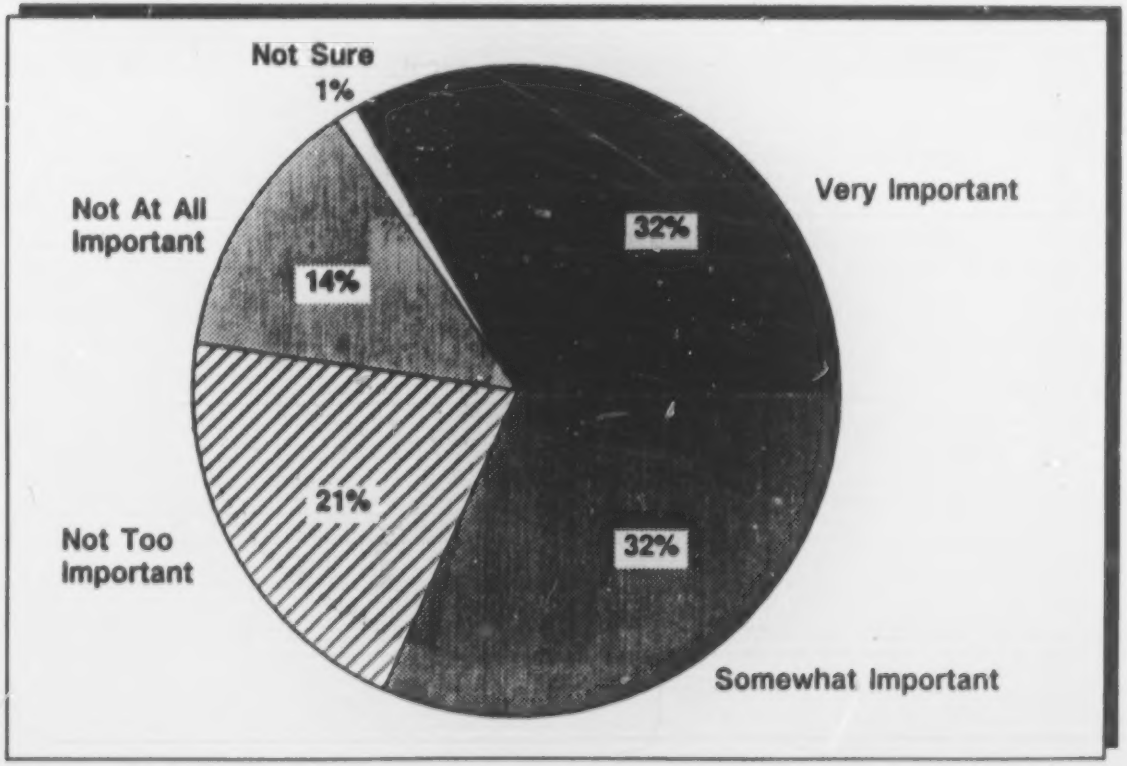
"Thinking about film ... how much do you rely on the advice of sales personnel when choosing film -- a lot, some, a little or not at all?"



Importance Of Film And Film Speed Choice

- Two in three (64%) photographers place significant importance in a choice of films and film speeds.

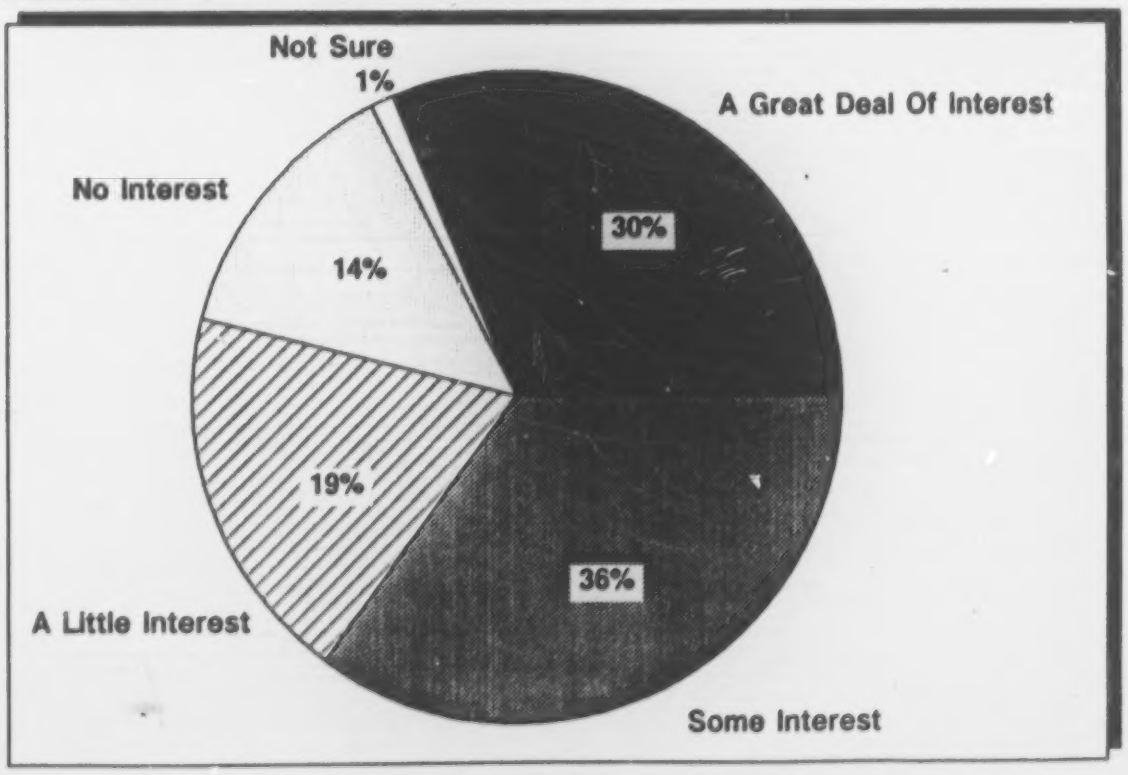
"How important is it for you to have a choice of films and film speeds?"



Interest In Film Designed Specifically For Pictures Of People

- Two in three (66%) express a significant interest in a film made especially for pictures of people.

"How much interest would you have in a film made especially for taking pictures of people?"



VII. Photo Processing

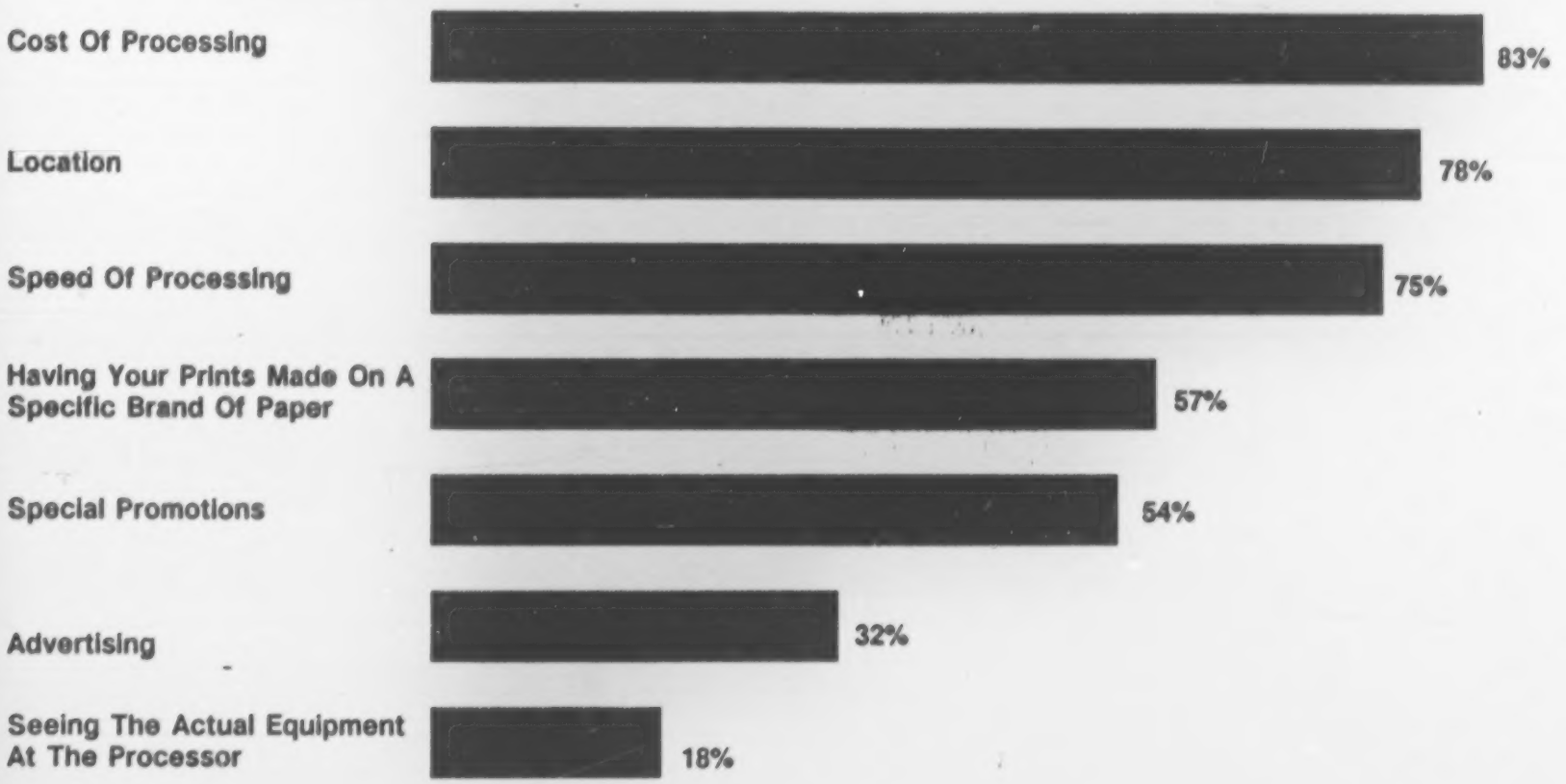
There are many important criteria consumers take into account when choosing where to have their film developed. Topping the list in importance are:

- **Cost of processing.**
- **Location.**
- **Speed of processing.**

Other important criteria are having prints made on a specific brand of paper and special promotions.

Important Criteria For Choosing Where Film Is Processed

Proportion saying very/somewhat important in deciding where to have pictures processed:



Important Criteria For Choosing Where Film Is Processed

"For each of the following, please tell me if it is very important, somewhat important or not very important in deciding where to have your pictures processed."

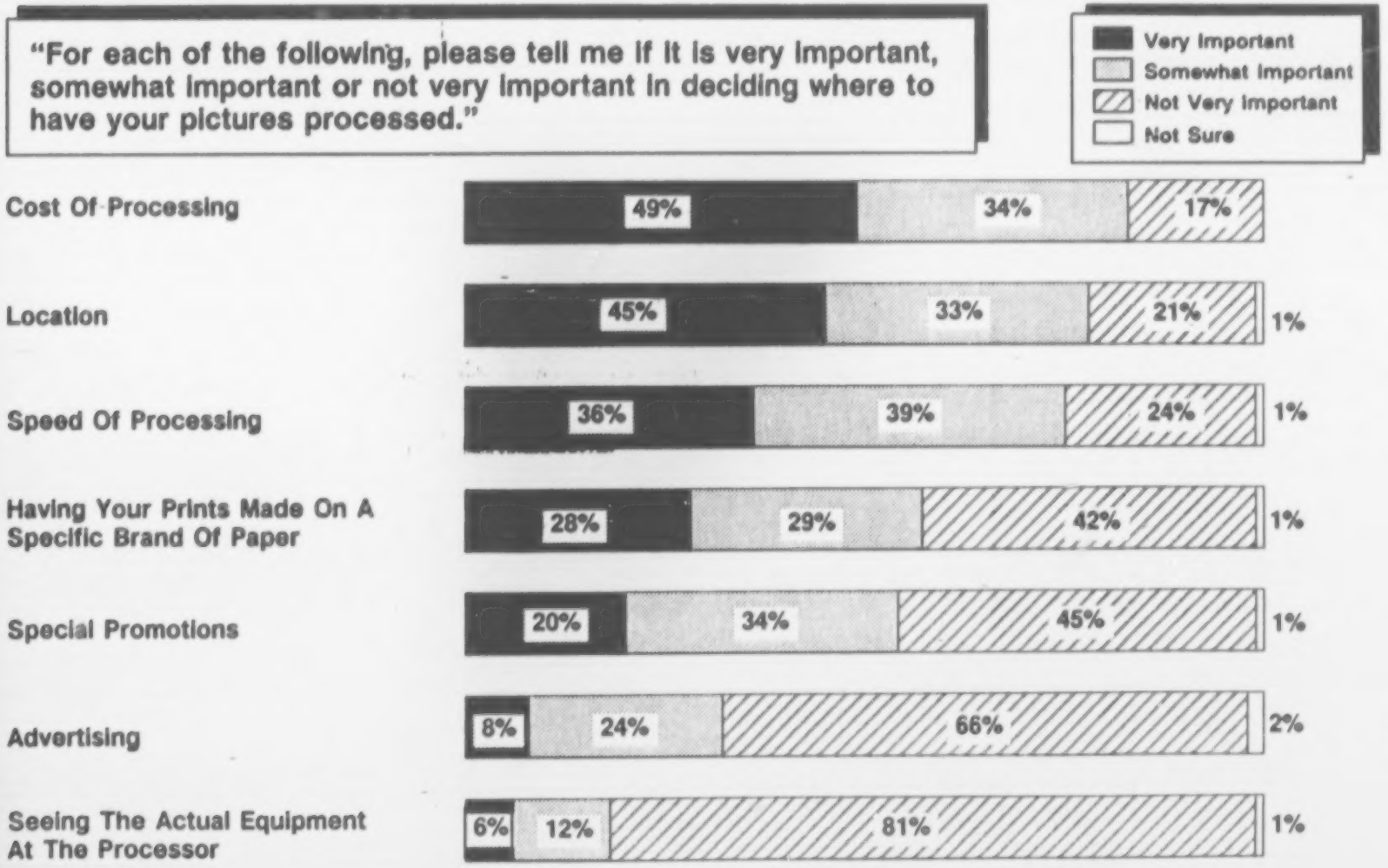
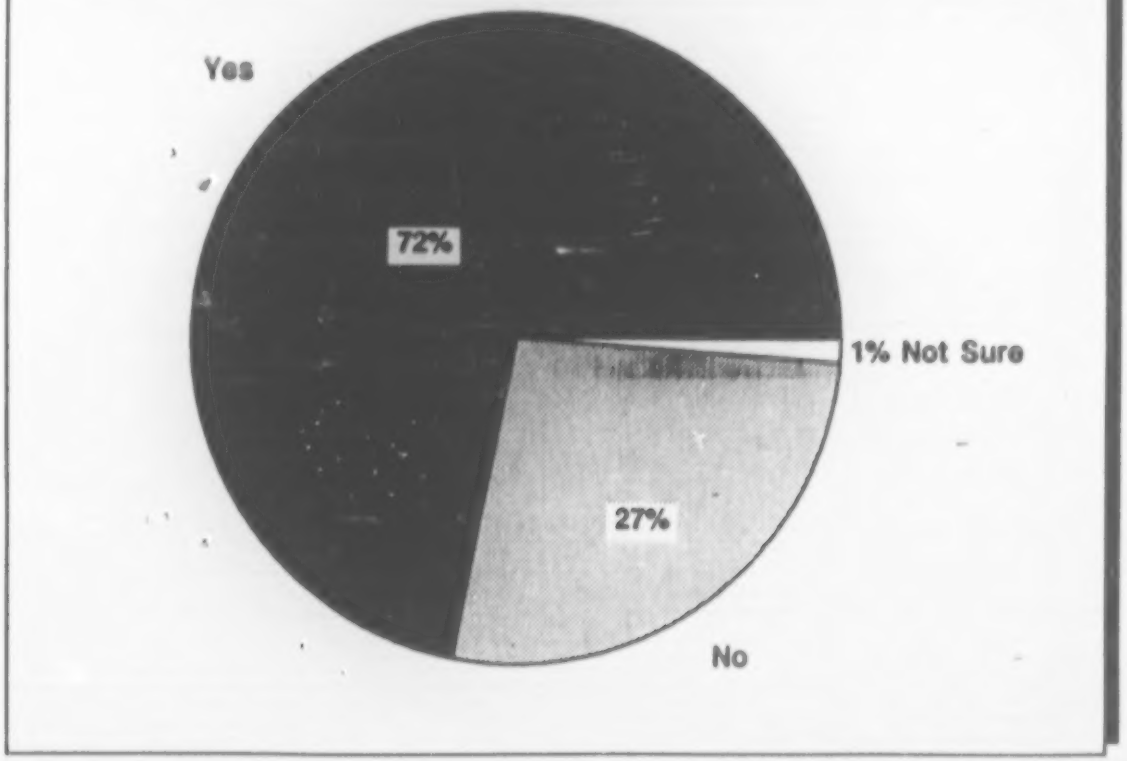


Photo Enlargements

"Have you ever had any of your photos enlarged?"



VIII. Camera Ownership

A majority of Americans uses a 35 millimeter camera.

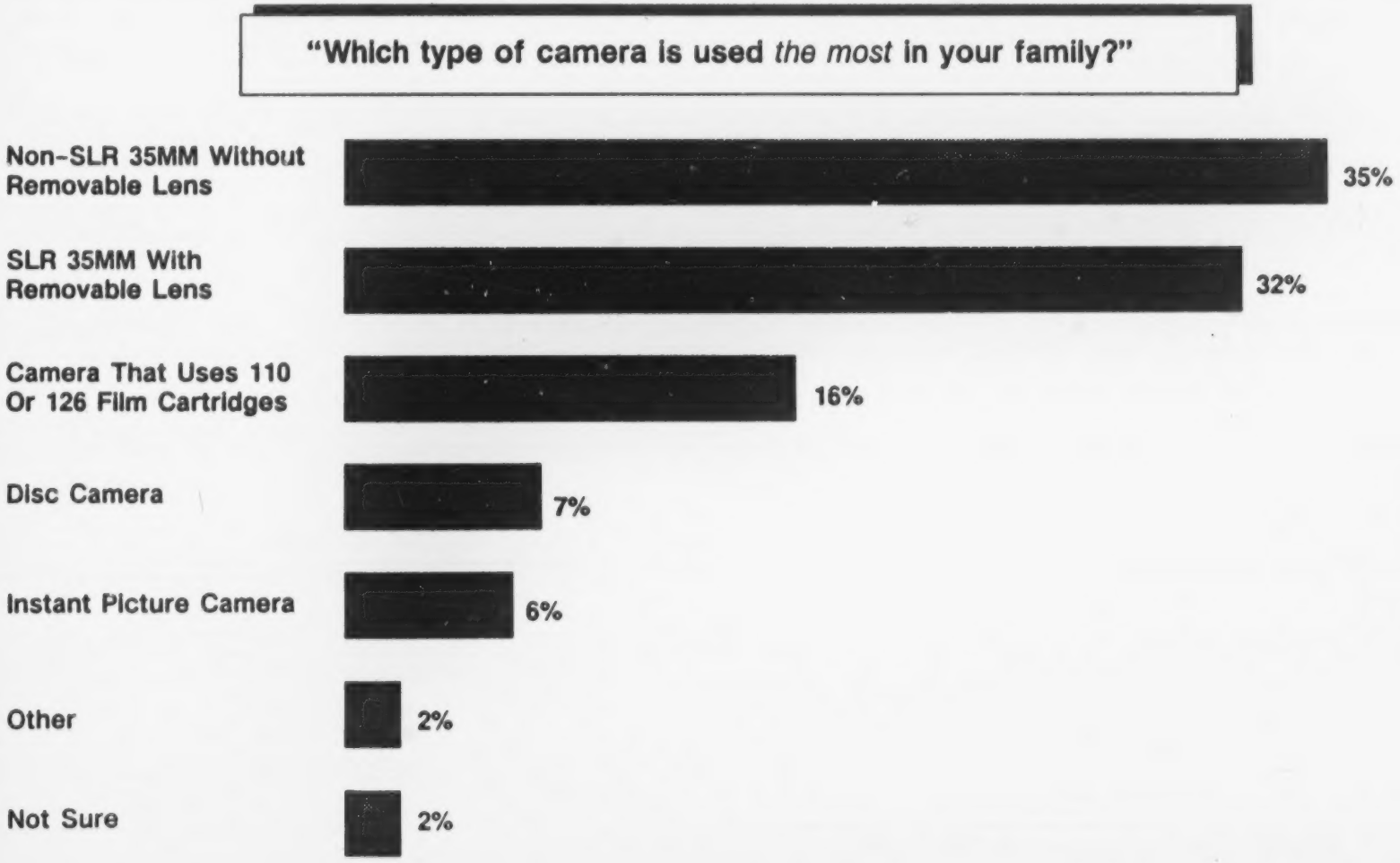
- **One in three principally uses a non-SLR camera without a removable lens.**
- **One in three principally uses an SLR camera with a removable lens.**

One in two photographers relies on the advice of sales personnel when buying a camera.

- **The most common reasons for buying new cameras are to upgrade the family camera or take advantage of new models that are easier to use.**
- **One in seven has used a one-time-use camera.**
- **One in five has a video camera in the household.**

Type Of Camera Used Most

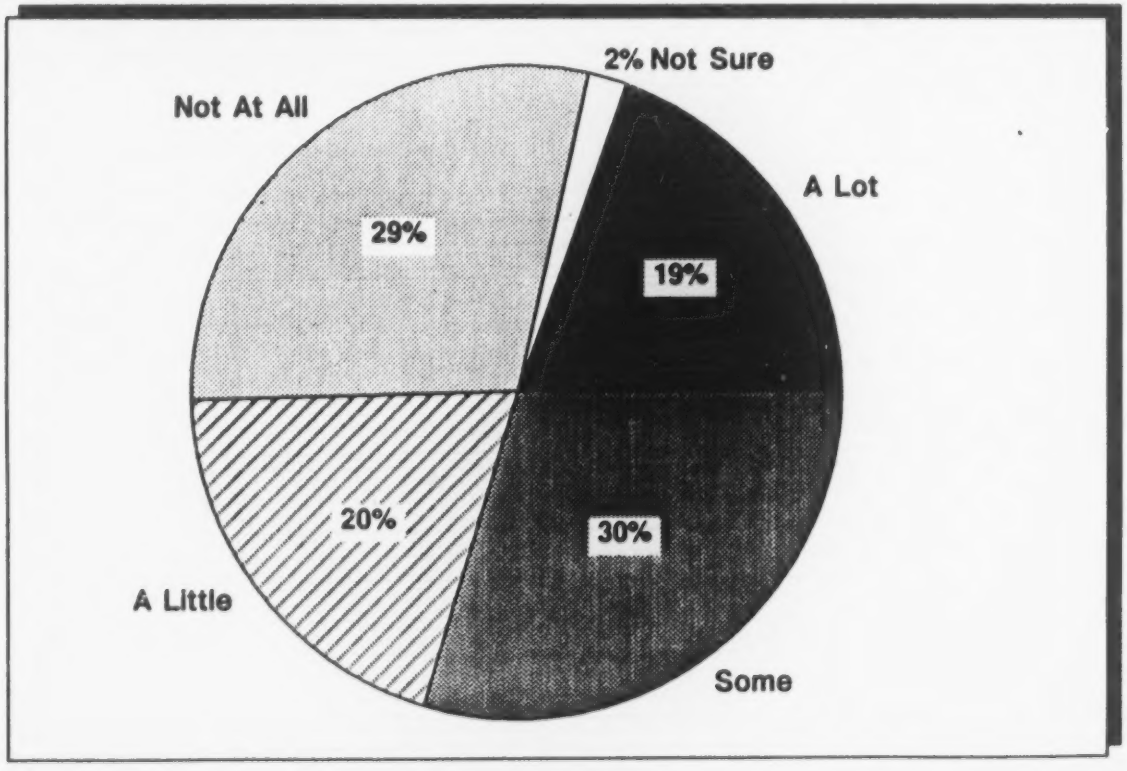
- Two in three (67%) amateur photographers use 35 millimeter cameras.



Reliance On Advice Of Sales Personnel When Purchasing A Camera

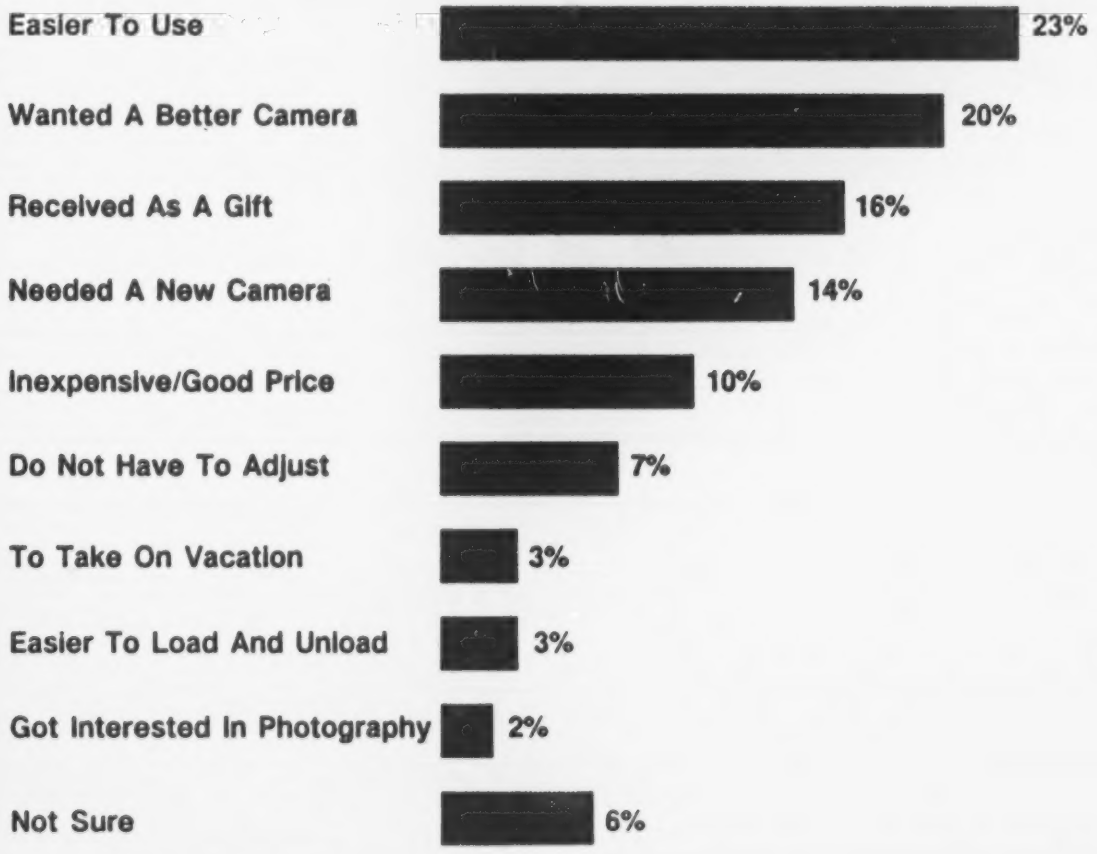
- One in two (49%) relies on sales personnel when choosing cameras.

"How much do you rely on the advice of sales personnel when choosing a camera -- a lot, some, a little or not at all?"



Reasons For Buying Newest Camera*

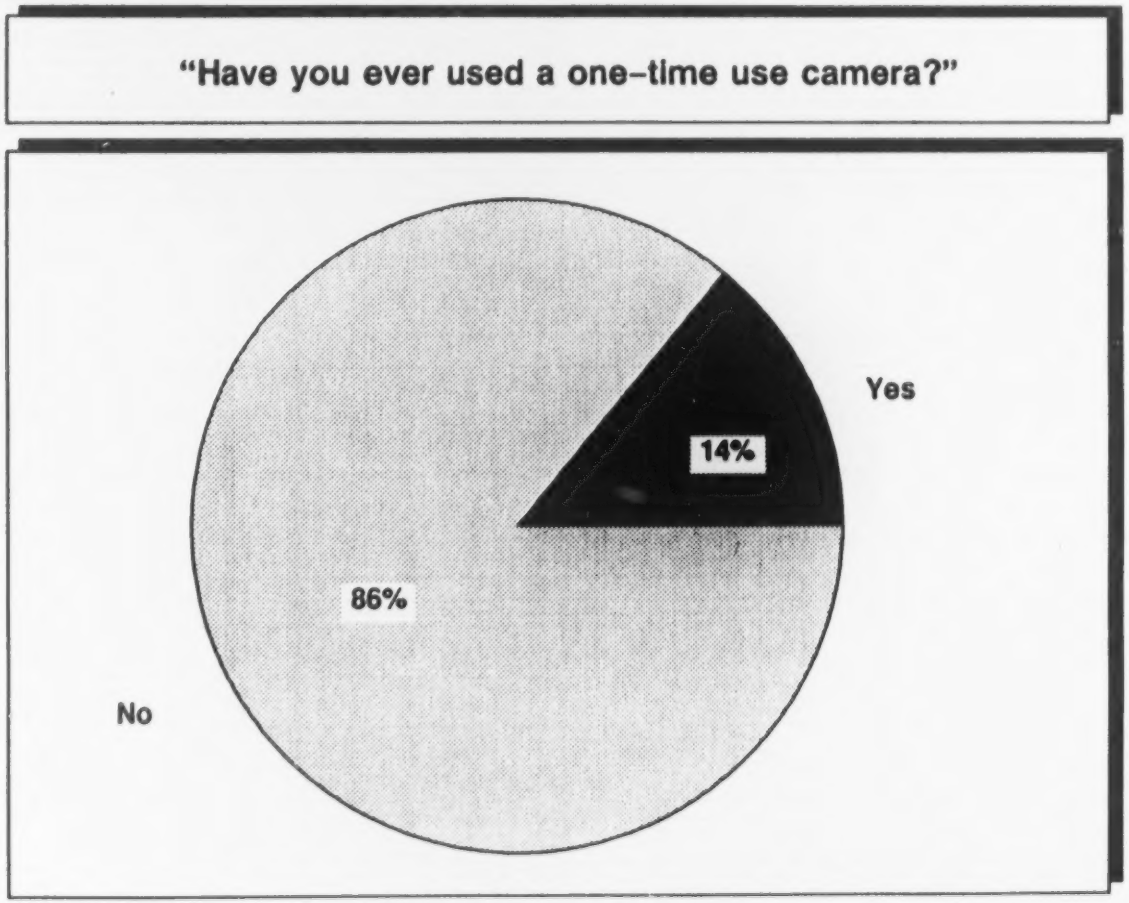
"Thinking about your newest camera, what were your reasons for buying it?"



* Unaided responses.

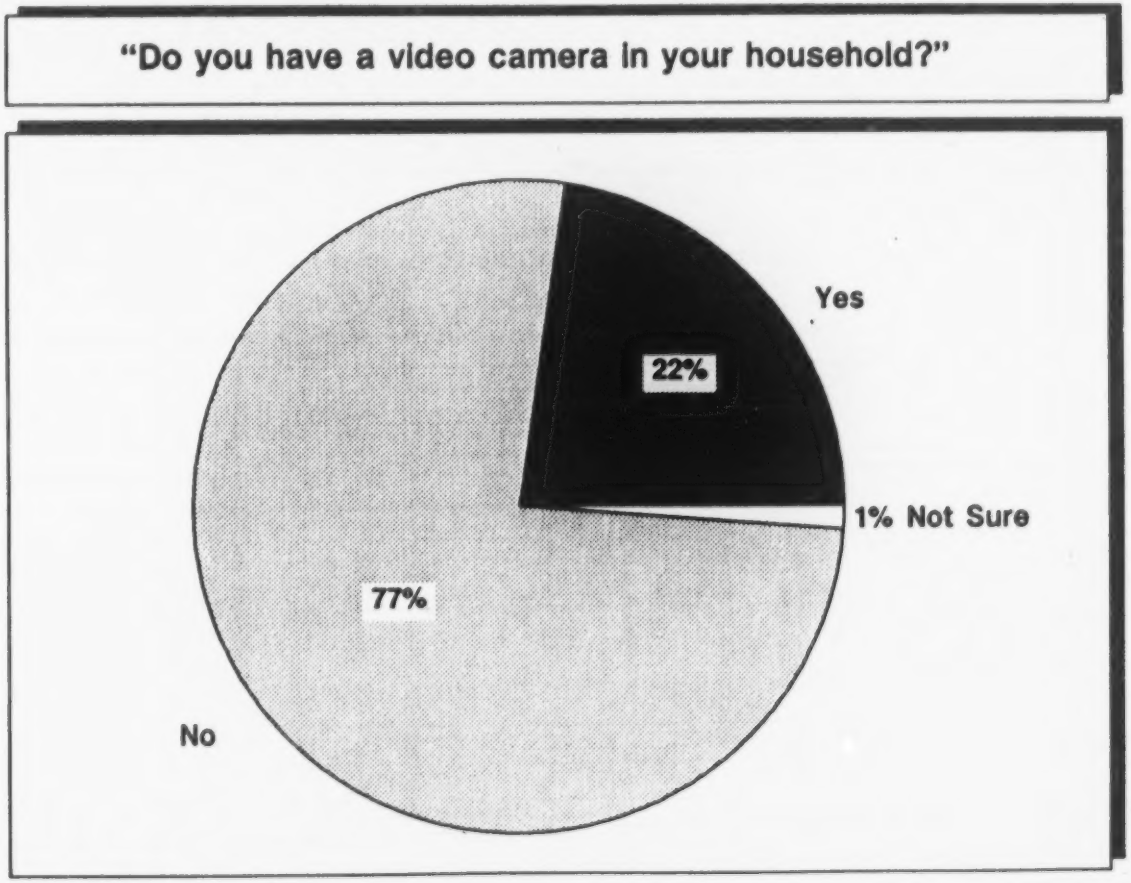
One-Time Camera Usage

- One in seven (14%) has used a one-time use camera.



Video Camera Ownership

- One in five (22%) households has a video camera.



Appendix: Sample Characteristics

	Total %
Sex	
Male	47
Female	53
Age	
18–24	17
25–29	12
30–34	14
35–39	13
40–49	17
50–64	17
65 and over	10
Marital Status	
Married	62
Single/Never married	24
Divorced/Separated	9
Widowed	4
Refused	1

Appendix: Sample Characteristics

	Total %
Education	
8th grade or less	1
Some high school	6
High school graduate	39
Some college	24
College graduate	20
Post graduate study	9
Refused	1
Household Income	
Less than $20,000	16
$20,000–$34,999	26
$35,000–$49,999	23
$50,000 or more	22
Refused	13

Appendix: Sample Characteristics

	Total %
Number Of People In Household	
One	13
Two	31
Three	21
Four	20
Five or more	14
Refused/Not sure	1
Number Of Children In Household	
None	53
One	20
Two	17
Three or more	9
Refused/Not sure	1
Race	
White	83
Black	8
Asian	1
Hispanic	4
Other	2
No answer	2

Appendix: Sample Characteristics

	Total %
Region	
Northeast	22
Midwest	26
South	31
West	21

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